HRMS End User Training

HRMS Basics Training Guide

State of Washington

Instructor Guide

Introduction

HR

Welcome everyone –

To Do:

Explain the logistics of the training facility outlined in the Training Facility Information sheet for the location.

Advise:

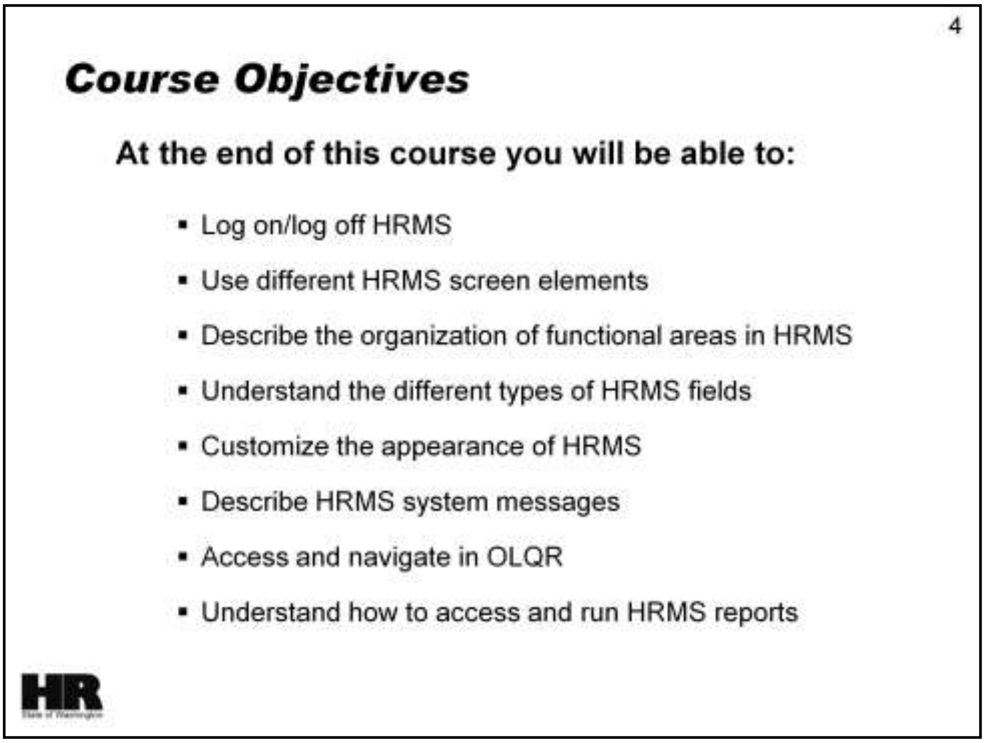
- parking requirements
- restroom locations
- emergency exits
- back door
- participant lounge
- cell phones

Don't Forget!

Go over:

- schedule for breaks
- general timing of the training activities.

Instructor –Ask how many students have used Microsoft Windows. (This is to help you assess your speed and coverage of windows related concepts e.g. drilling down menus, folders etc.)

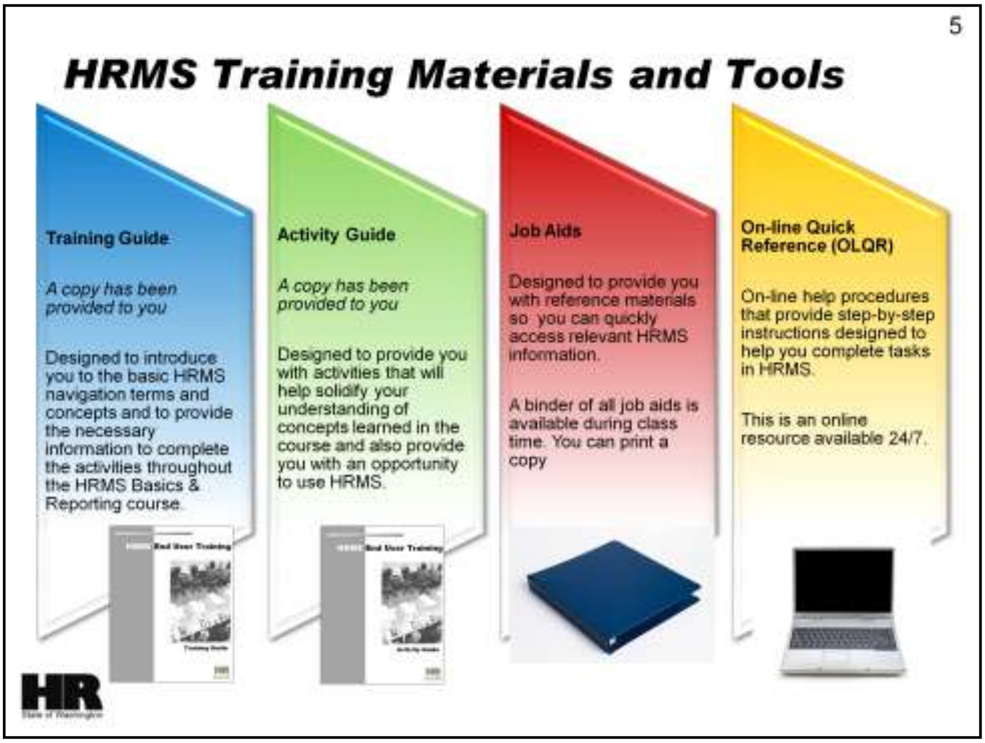


Course Objectives

At the end of this course you will be able to:

- Log on/log off HRMS
- Use different HRMS screen elements
- Describe the organization of functional areas in HRMS
- Understand the different types of HRMS fields
- Customize the appearance of HRMS
- Describe HRMS system messages
- Access and navigate in OLQR
- Understand how to access and run HRMS reports

Instructor *–Benefits of taking this course allows the end user to see the system* ***and*** *have hands-on experience prior to taking the functional training courses.*



HRMS Training Materials and Tools

Training Guide

A copy has been provided to you

Designed to introduce you to the basic HRMS navigation terms and concepts and to provide the necessary information to complete the activities throughout the HRMS Basics & Reporting course.

Activity Guide

A copy has been provided to you

Designed to provide you with activities that will help solidify your understanding of concepts learned in the course and also provide you with an opportunity to use HRMS.

Job Aids

Designed to provide you with reference materials so you can quickly access relevant HRMS information.

A binder of all job aids is available during class time. You can print a copy

On-line Quick Reference (OLQR)

On-line help procedures that provide step-by-step instructions designed to help you complete tasks in HRMS.

This is an online resource available 24/7.

Instructor – Explain the limitations of the training database. For example, participants are not using data from their agency.

- ✓ Additionally, names and scenarios have been created for the purpose of this training course only.
- ✓ The training guide can be used as a user guide after the course is completed. It can be printed from the Training page on the customer support web page.

Job Aids

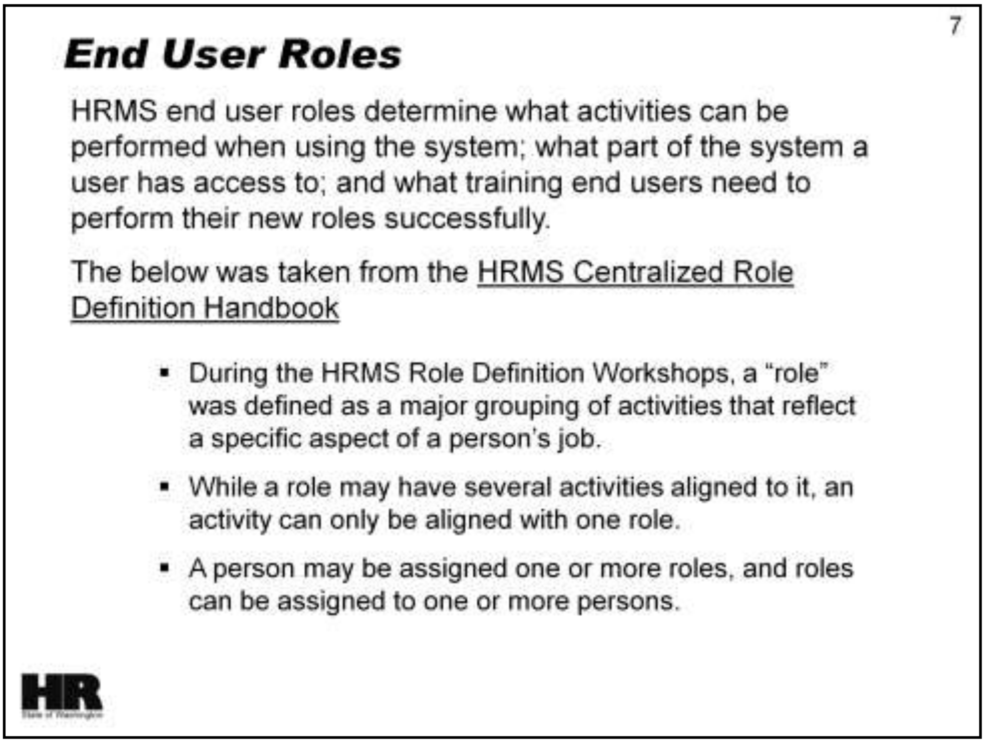
The following job aids are available to you and are applicable to HRMS Basics:

- HRMS Basics
- Accessing HRMS
- General Reporting
- Inquirer Roles
- Supervisor Roles

http://www.dop.wa.gov/HRMS/CustomerSupport/Training

***Instructor** – Please refer to these job aids and point out what you can find on each one.*

While you are in class, you can review the job aids found in the binder on your desk. These binders are to remain in the classroom.



End User Roles

HRMS end user roles determine what activities can be performed when using the system; what part of the system a user has access to; and what training end users need to perform their new roles successfully.

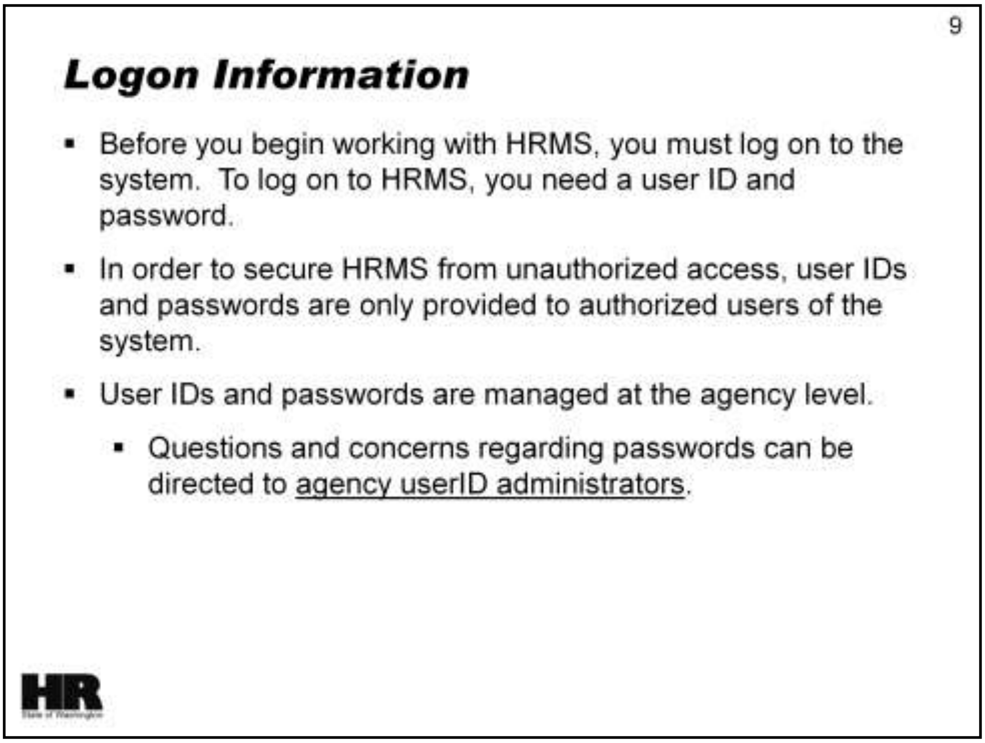
The below was taken from the HRMS Centralized Role Definition Handbook

- During the HRMS Role Definition Workshops, a “role” was defined as a major grouping of activities that reflect a specific aspect of a person’s job.
- While a role may have several activities aligned to it, an activity can only be aligned with one role.
- A person may be assigned one or more roles, and roles can be assigned to one or more persons.

Instructor *– Remind participants that a role is not a position description or a Classification Questionnaire (CQ).*

- ✓ Ask if participants know what role they are assigned to. If they wish to know their role, they will need to check with their agency HR Office or Change Agent.
- ✓ Agencies have “mapped” end users to roles based on their business processes, resources, and size of organization.
- ✓ A person may be assigned more than one role. For example, an end user from a small agency·may have more than one role for the agency. In this case, the same person may be both the Time Management Inquirer and Payroll Inquirer.
- ✓ The amount of information you can view is determined by your agency structure. For example, in one agency the Personnel Administration Processor may view employee data from all agency departments, while in another agency the Personnel Administration Processor can only view data for one department.

Launching HRMS

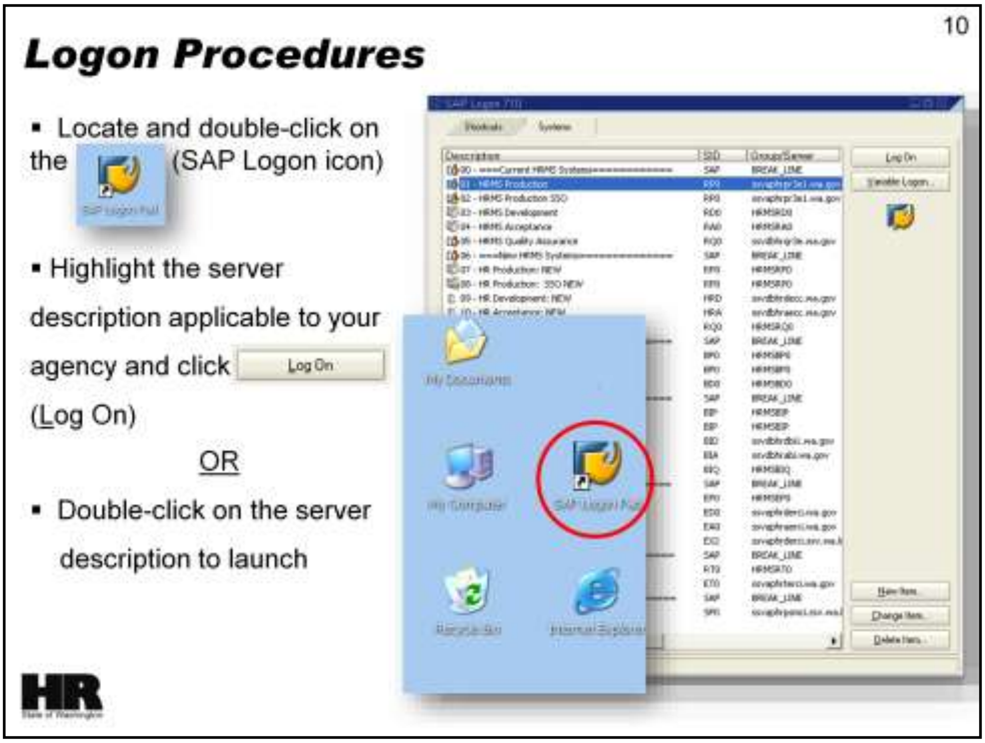


Logon Information

- Before you begin working with HRMS, you must log on to the system. To log on to HRMS, you need a user ID and password.
- In order to secure HRMS from unauthorized access, user IDs and passwords are only provided to authorized users of the system.
- User IDs and passwords are managed at the agency level.
    - Questions and concerns regarding passwords can be directed to agency userID administrators.

Instructor – *Ask participants NOT log into the system yet, as they will be doing this as an activity at the end of the section.*

✓ Each agency has at least one Security Administrator, if there are problems with a user's ID or password, the Agency Security Administrator should contact the ISD Help Desk- 360-664-6400.



Logon Procedures

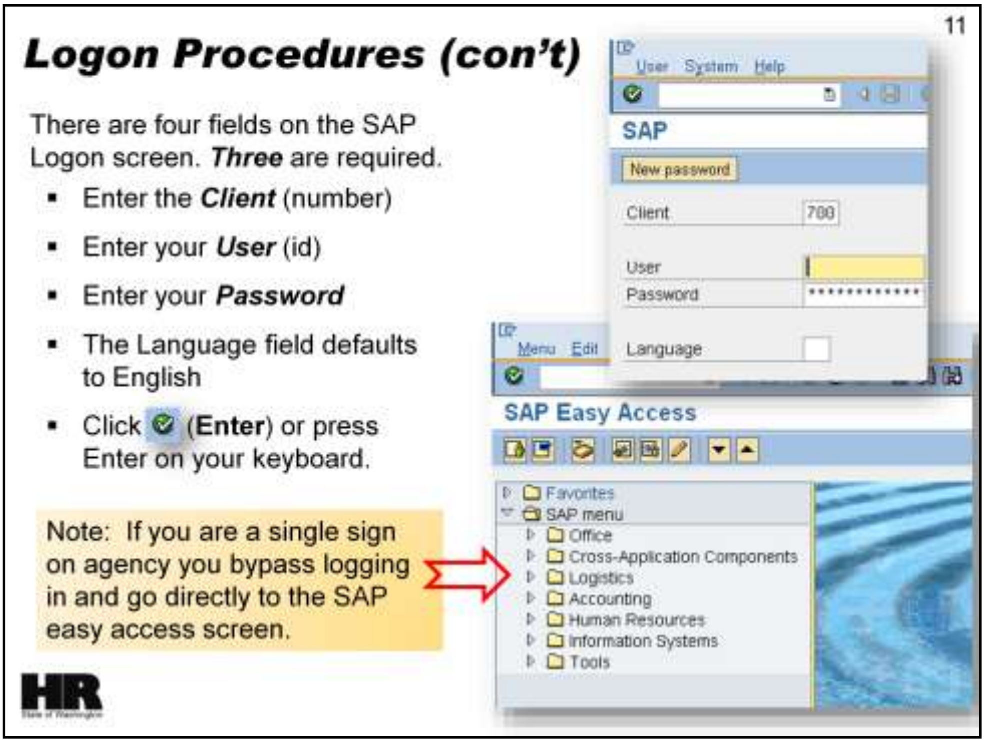
- Locate and double-click on the (SAP Logon icon)
- Highlight the server description applicable to your agency and click Log On (Log On)

OR

- Double-click on the server description to launch

SAP Logon Pad
Log On
Variable Logon...
New Item...
Change Item...
Delete Item...
My Documents
My Computer
SAP Logon Pad
Recycle Bin
Internet Explorer

- ✓ For some of you, you will have both the SAP Logon icon and the SAP Logon Pad - choose either one.



Logon Procedures (con't)

There are four fields on the SAP Logon screen. ***Three*** are required.

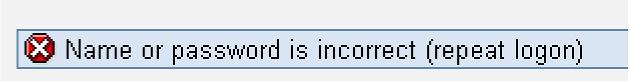
- Enter the ***Client*** (number)
- Enter your ***User*** (id)
- Enter your ***Password***
- The Language field defaults to English
- Click ✓ (**Enter**) or press Enter on your keyboard.

Note: If you are a single sign on agency you bypass logging in and go directly to the SAP easy access screen.

Client 700
User
Password *************
Language

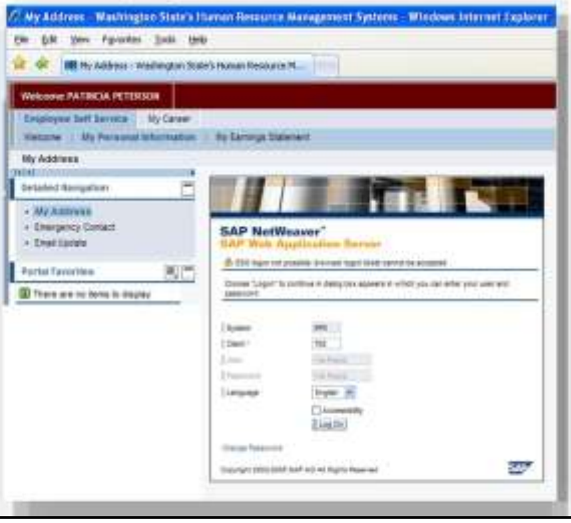
User System Help
SAP
New password
Menu Edit
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
Information Systems
Tools
HR

- ✓ The Client number is a three digit number. This will default if you have access to only one client. If you have access to multiple clients you will need to type in the client number.
- ✓ Client number, User ID and Password will be distributed by your agency.
- ✓ The asterisks in the Password field will not go away when you type your password so that others cannot view it.
- ✓ Leave the language field blank. English is the only available language, therefore, the system defaults to English. (If you attempt to enter something other than EN you will receive an error message.)
- ✓ Tip: If you mistakenly type something wrong into any of these fields you will receive an error message. When you fix the error make sure to retype your password every time. Your password is not retained in the password field.


Name or password is incorrect (repeat logon)

Accessing HRMS through Web Access

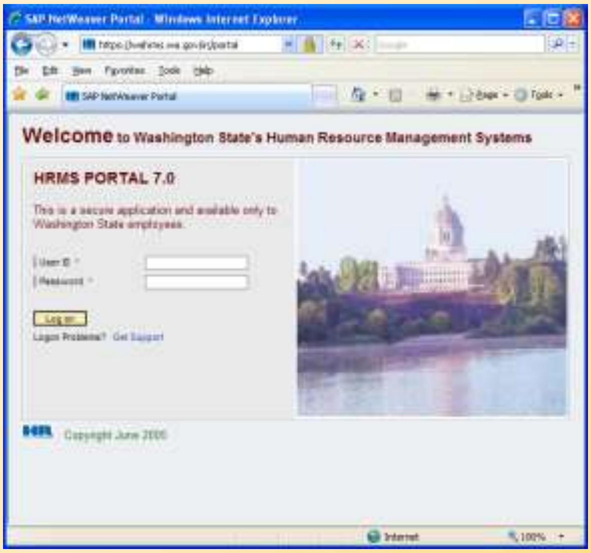
- To access the HRMS Portal, open Internet Explorer from your desktop and type in the web address in the address field https://wahrms.wa.gov



Agency's access the portal differently. Your agency access may look different than this example.

Instructor – This review of Web Access is intended to show users a another way some employee access SAP. It provides users a general feel of what HRMS Portal looks like. Each agency is different on how they will be accessing the HRMS Portal.

Before accessing SAP you need to pass through and log on to the HRMS Portal.



Welcome to Washington State's Human Resource Management Systems

HRMS PORTAL 7.0

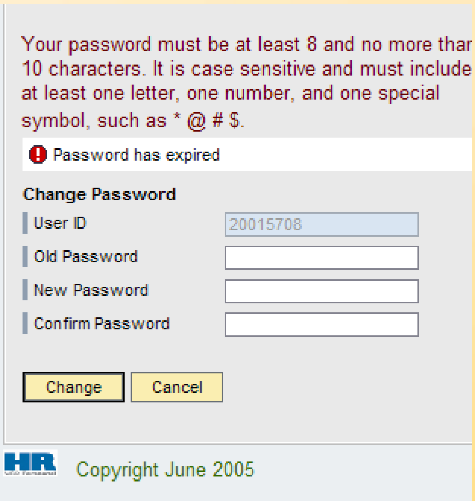
This is a secure application and available only to Washington State employees.

User ID *
Password *

Log on
Logon Problems? Get Support

Copyright June 2005

The HRMS Portal complies to the same password restraints as SAP.



Your password must be at least 8 and no more than 10 characters. It is case sensitive and must include at least one letter, one number, and one special symbol, such as * @ # $.

Password has expired

Change Password

User ID	20015708
Old Password	
New Password	
Confirm Password	

Change Cancel

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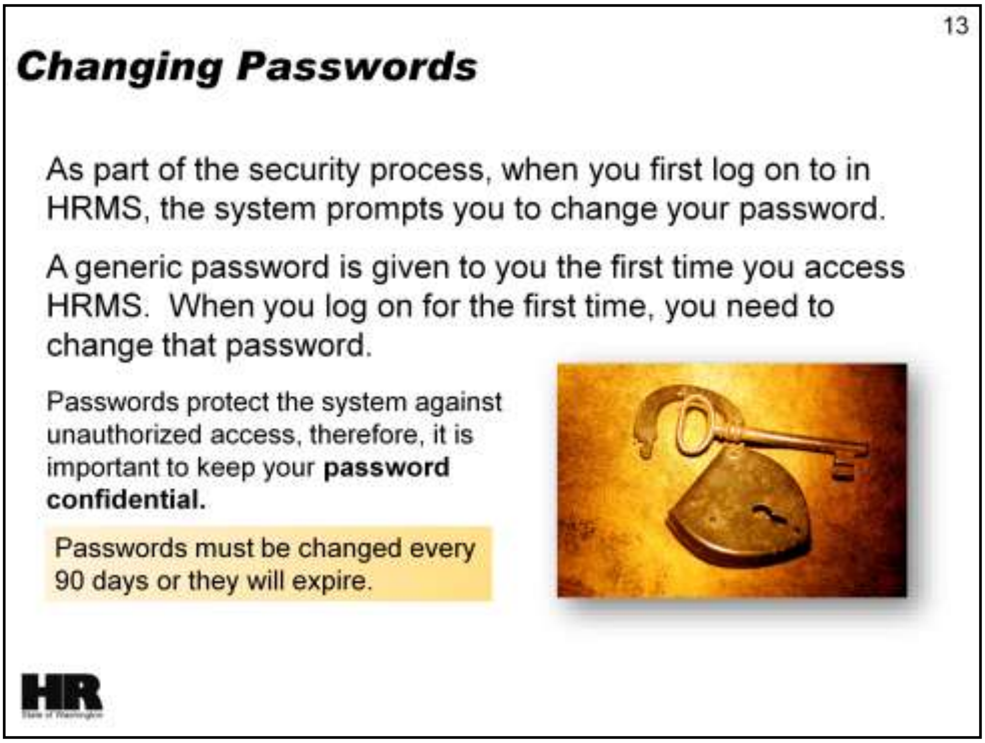


Changing Passwords

As part of the security process, when you first log on to in HRMS, the system prompts you to change your password.

A generic password is given to you the first time you access HRMS. When you log on for the first time, you need to change that password.

Passwords protect the system against unauthorized access, therefore, it is important to keep your **password confidential.**

Passwords must be changed every 90 days or they will expire.

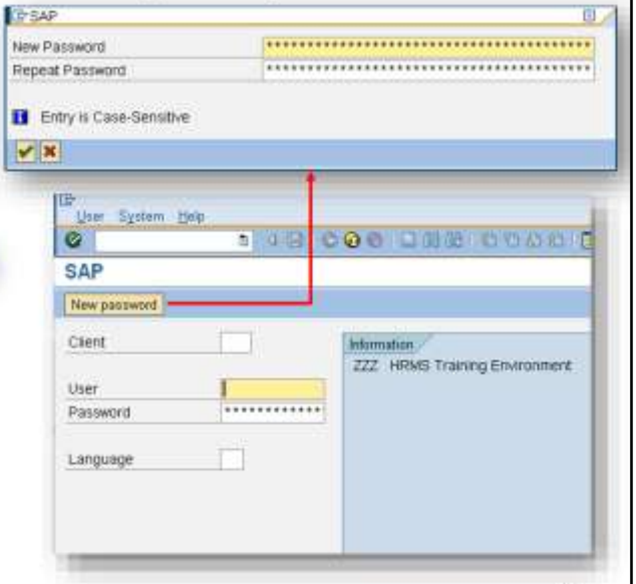
Instructor – Department of Personnel's password standards are to be changed every 90 days.

Changing Passwords (con't)

- To change your password, complete all of the fields on the *SAP Log on* screen then
  1. Click the New password **New password** button

  or

  2. Press the F5 key on your keyboard to access the **New password** box



SAP

New Password **

Repeat Password **

Entry is Case-Sensitive

Client

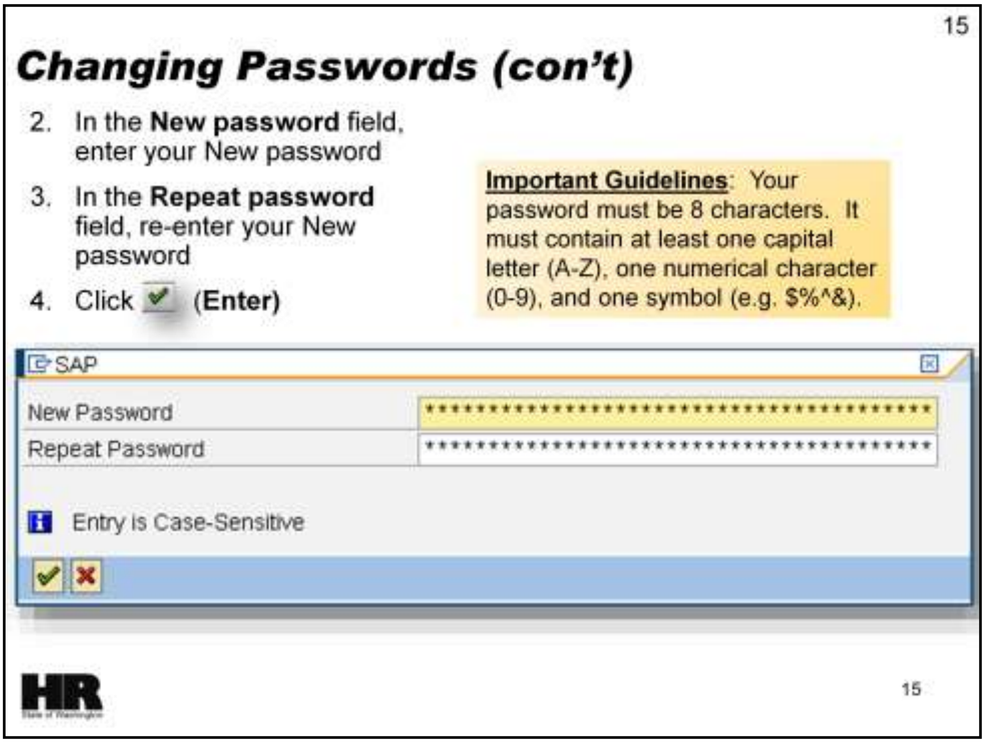
User

Password *************

Language

Information

ZZZ HRMS Training Environment



Changing Passwords (con't)

2. In the **New password** field, enter your New password
3. In the **Repeat password** field, re-enter your New password
4. Click ✓ **(Enter)**

Important Guidelines: Your password must be 8 characters. It must contain at least one capital letter (A-Z), one numerical character (0-9), and one symbol (e.g. $%^&).

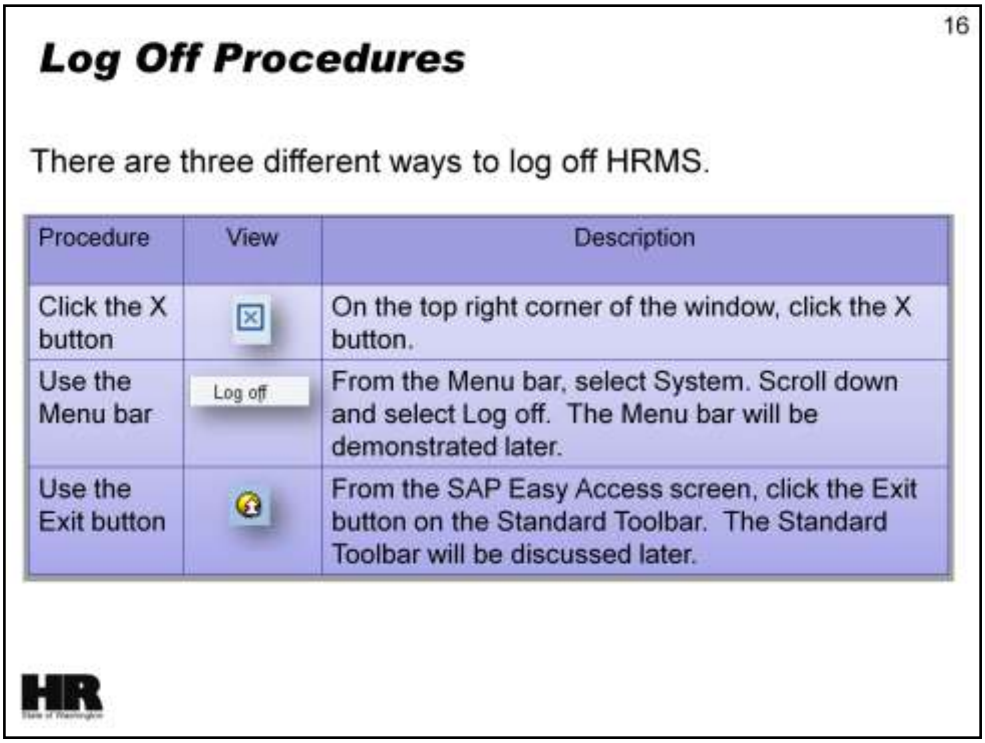
SAP

New Password	**
Repeat Password	**

Entry is Case-Sensitive

Additional Information:

- ✓ The asterisks in the New Password and Repeat Password fields default when you type your password so that others can not view it. They will not disappear when typing in the field.
- ✓ If you forget your password, follow your agency's process for having password reset such as contacting your internal Help Desk or IT Staff.
- ✓ You are allowed three (3) failed attempts before your userID is locked.
- ✓ HRMS remembers the last 5 passwords used to prevent them from being re-used.



Log Off Procedures

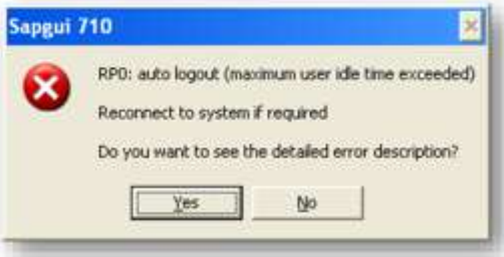
There are three different ways to log off HRMS.

Procedure	View	Description
Click the X button	☒	On the top right corner of the window, click the X button.
Use the Menu bar	Log off	From the Menu bar, select System. Scroll down and select Log off. The Menu bar will be demonstrated later.
Use the Exit button	●	From the SAP Easy Access screen, click the Exit button on the Standard Toolbar. The Standard Toolbar will be discussed later.

- ✓ When logging off, you are prompted with a dialog box that reads 'Unsaved data will be lost. Do you still want to Logoff?'. The dialog box provides you with a Yes or No option. This is to verify that you intend to log off HRMS.
- ✓ The Exit button is also known as the Log off button. If you place the mouse over the Exit button, the words "Log off" will display

Automatic Log Off

- If the system is left idle with no user input, the system will time out and a pop-up message will appear.
- The standard idle time for is set at 30 minutes.
- To begin work in the system again, log in.



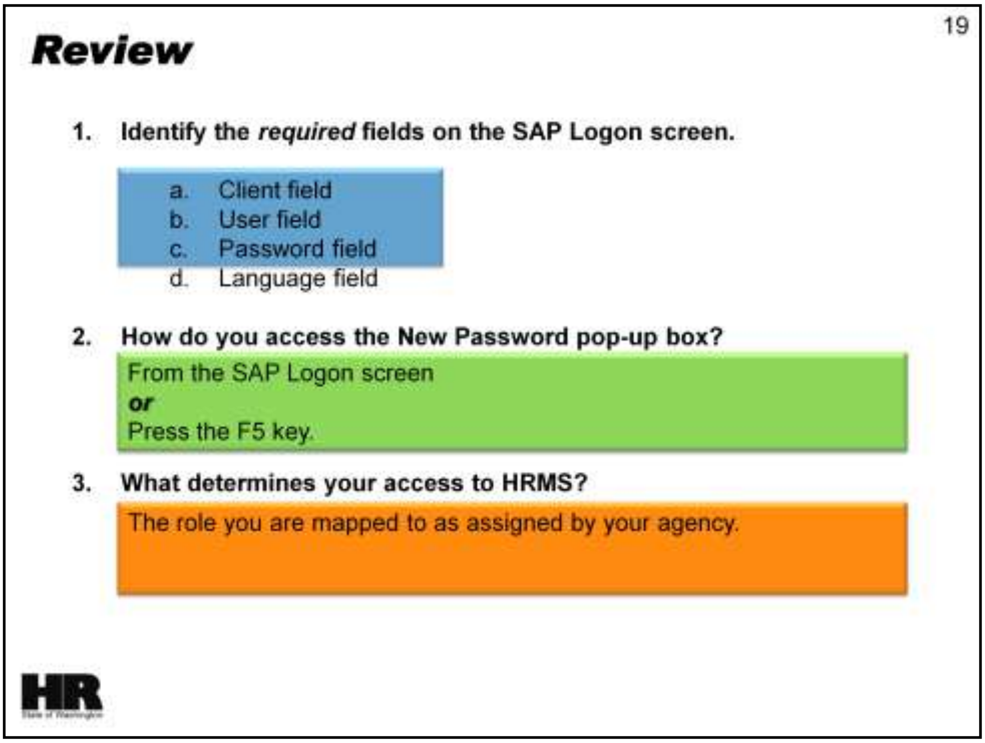
RP0: auto logout (maximum user idle time exceeded)

Reconnect to system if required

Do you want to see the detailed error description?

HRMS Activity

Log on and Log off HRMS
Activity Packet - Page 4



Review

1. **Identify the *required* fields on the SAP Logon screen.**
   - a. Client field
   - b. User field
   - c. Password field
   - d. Language field
2. **How do you access the New Password pop-up box?**

   From the SAP Logon screen
   or
   Press the F5 key.
3. **What determines your access to HRMS?**

   The role you are mapped to as assigned by your agency.

Instructor: *Allow the class time write out the answers*

Answers:

Question 1:

a. Client

b. User

c. Password

   - The Language field *defaults* to English if left blank.

Question 2:

- You can access the ***New password*** pop-up box by clicking the box (new password) ***or*** pressing F5 key.

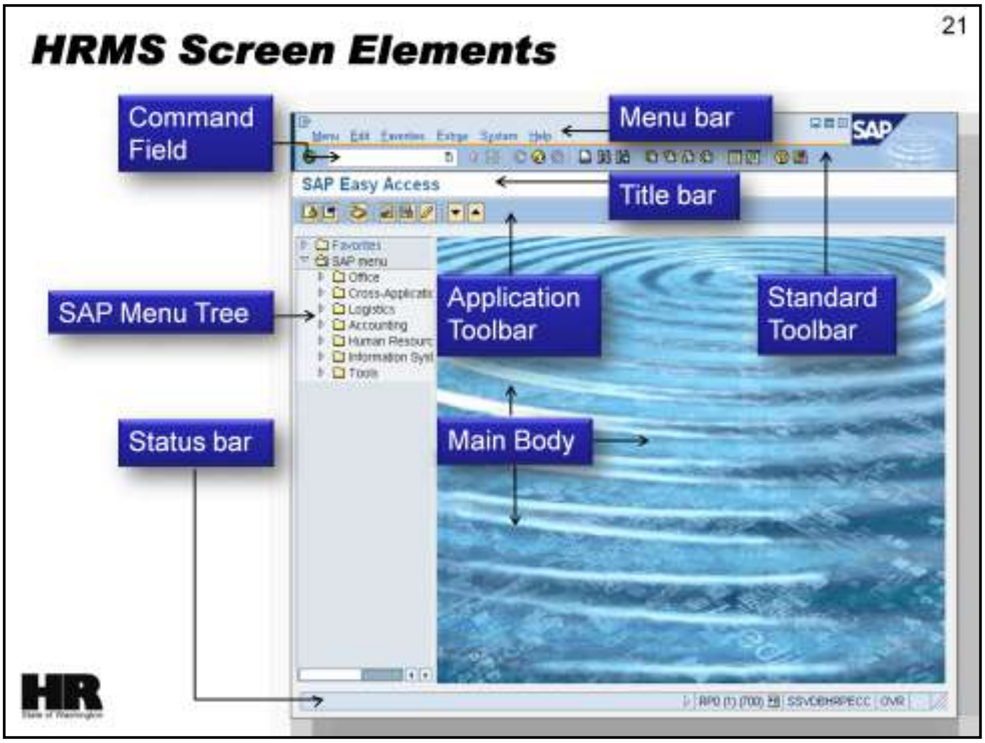
Question 3:

- IDs and Passwords are assigned at the agency level. You can access your information based on the role you are mapped to.

Before we move on?

HRMS Screen Elements

HRMS Screen Elements

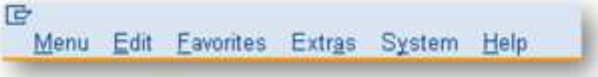

Command Field
Menu bar
Title bar
SAP Menu Tree
Application Toolbar
Standard Toolbar
Main Body
Status bar
Menu Edit Favorites Extras System Help
SAP Easy Access
Favorites
SAP menu
Office
Cross-Applicatio
Logistics
Accounting
Human Resourc
Information Syst
Tools
RP0 (1) (700)
SSVDEHRPECC
OVR

***Instructor** – Identify where these are and that we will go into greater detail later in the course.*

- ✓ Reference HRMS Basics job aid Accessing HRMS.
- ✓ Main body – located beneath the Application Toolbar.
- ✓ Menu bar – located at the top of the screen.
- ✓ Standard Toolbar – located directly below the Menu bar.
- ✓ Title bar – located below the Standard Toolbar.
- ✓ Application Toolbar – located below the Title bar. Sometimes referred to as the Function Toolbar.
- ✓ Status bar – located at the bottom of the screen under the Main body.
- ✓ Command field – located on the Standard Toolbar.

Menu Bar

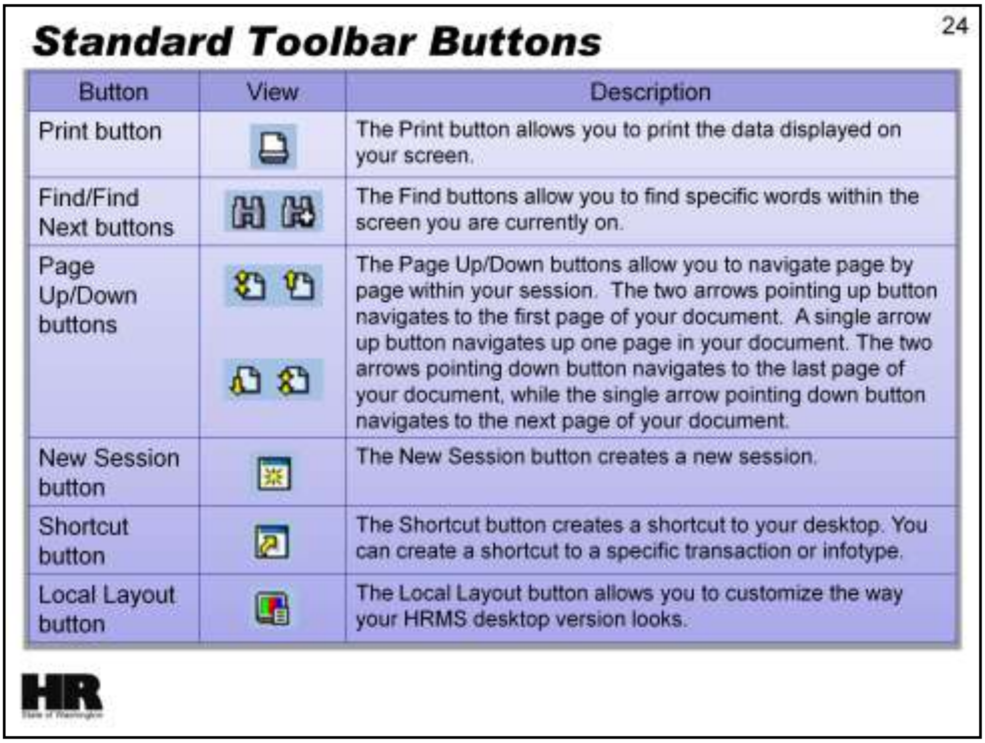
The Menu bar is located at the top of the screen. When clicked, a drop-down menu appears prompting the user to select an option.



Selection	Description
Menu	Used to access the user menu and HRMS menu.
Edit	Used to execute a transaction in a current or new window or create a shortcut on your desktop.
Favorites	Used to maintain a list of your commonly used transactions.
Extras	Used to display documentation and set various system settings.
System	Used to customize the system or create a new session.
Help	Used to select HRMS Help which provides access to the On-Line Quick Reference (OLQR).

Standard Toolbar Buttons

Button	View	Description
Enter button	✓	The Enter button validates that required fields have been entered before continuing to the next infotype.
Save button	💾	The Save button stores changes in the system.
Back button	←	The Back button navigates to the last page you were on prior to the transaction you are currently in.
Exit button	⇧	The Exit button navigates out of the transaction you are currently working in and back to the SAP Easy Access screen. All unsaved data is lost when using the Exit button. You will get a warning to save your data.
Cancel button	✖	The Cancel button navigates out of the transaction you are currently working in and back to the SAP Easy Access screen. Like the Exit button all unsaved data is lost when using the Cancel button, however, you do not get a warning to save.



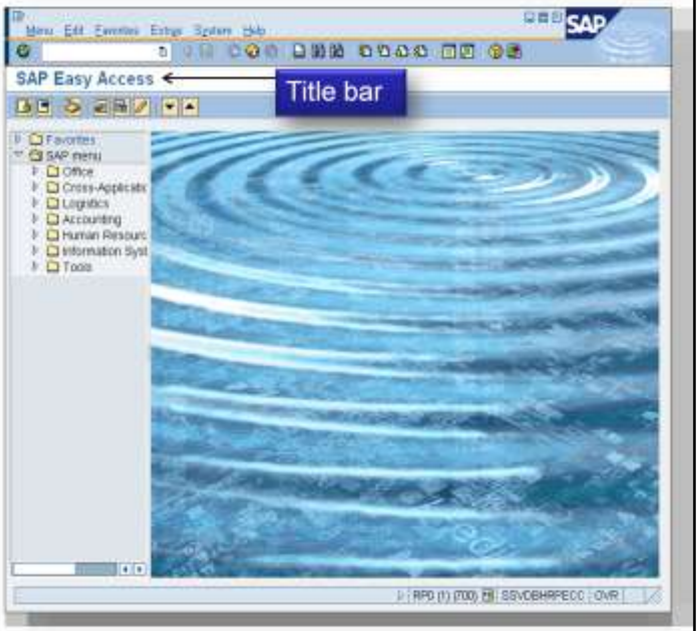
Standard Toolbar Buttons

Button	View	Description
Print button		The Print button allows you to print the data displayed on your screen.
Find/Find Next buttons		The Find buttons allow you to find specific words within the screen you are currently on.
Page Up/Down buttons		The Page Up/Down buttons allow you to navigate page by page within your session. The two arrows pointing up button navigates to the first page of your document. A single arrow up button navigates up one page in your document. The two arrows pointing down button navigates to the last page of your document, while the single arrow pointing down button navigates to the next page of your document.
New Session button		The New Session button creates a new session.
Shortcut button		The Shortcut button creates a shortcut to your desktop. You can create a shortcut to a specific transaction or infotype.
Local Layout button		The Local Layout button allows you to customize the way your HRMS desktop version looks.

- ✓ Shortcuts will not work until you are logged on to HRMS. Should you attempt to launch a shortcut key prior to logging on, you are prompted to log on to HRMS. This is to maintain security.

Title Bar

- The Title Bar shows the title of the current screen you are working in. It also displays infotype and report names.
- This example illustrates that you are working in the SAP Easy Access screen.


Menu Edit Favorites Extras System Help
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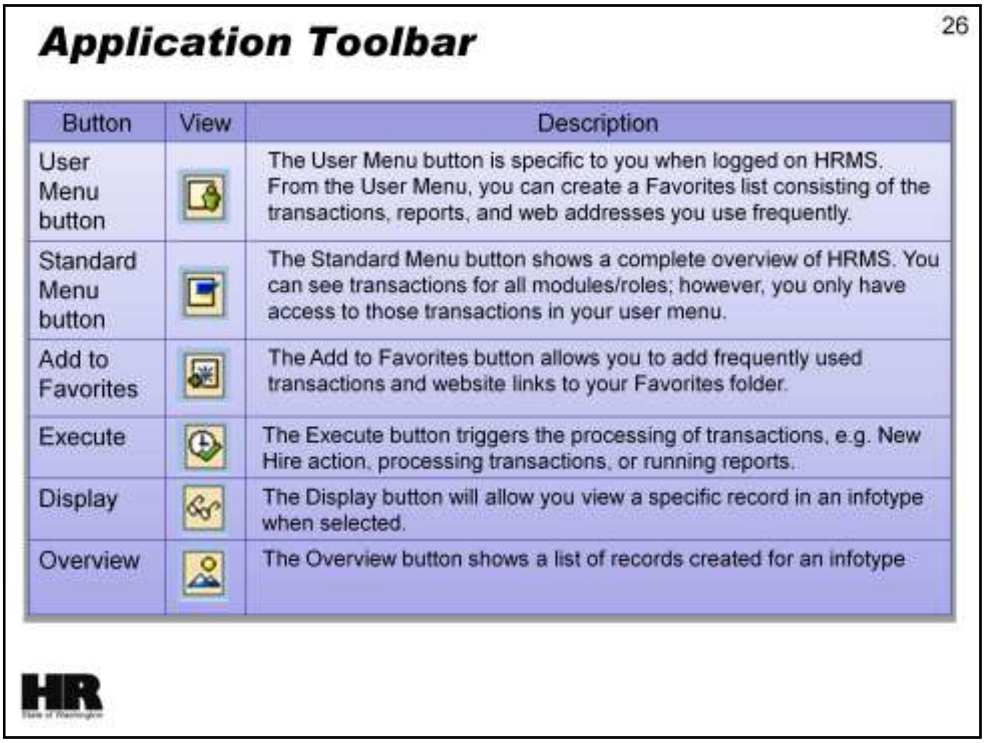
OVR

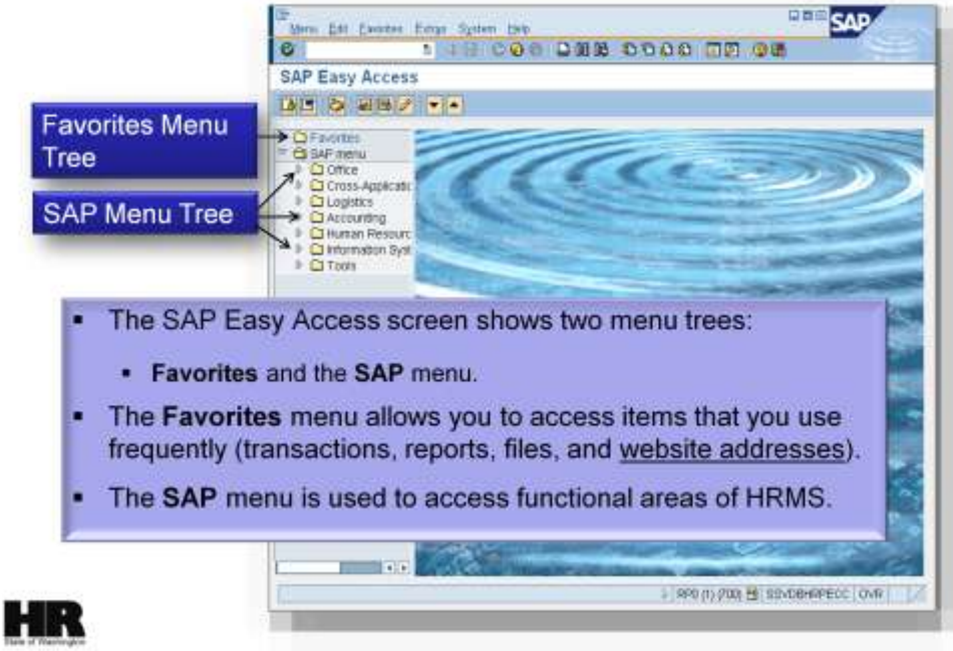


Application Toolbar

Button	View	Description
User Menu button		The User Menu button is specific to you when logged on HRMS. From the User Menu, you can create a Favorites list consisting of the transactions, reports, and web addresses you use frequently.
Standard Menu button		The Standard Menu button shows a complete overview of HRMS. You can see transactions for all modules/roles; however, you only have access to those transactions in your user menu.
Add to Favorites		The Add to Favorites button allows you to add frequently used transactions and website links to your Favorites folder.
Execute		The Execute button triggers the processing of transactions, e.g. New Hire action, processing transactions, or running reports.
Display		The Display button will allow you view a specific record in an infotype when selected.
Overview		The Overview button shows a list of records created for an infotype

- ✓ The Application Toolbar contains buttons related to a specific system task or transaction.
- ✓ The buttons on the Application Toolbar change as you move from screen to screen. This toolbar is sometimes referred to as the Function Toolbar.

SAP Menu Tree


Menu Edit Favorites Extras System Help
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SAP Easy Access
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Accounting
Human Resourc
Information Syst
Tools
RP0 (1) (700) SSVDBHRPECC OVR

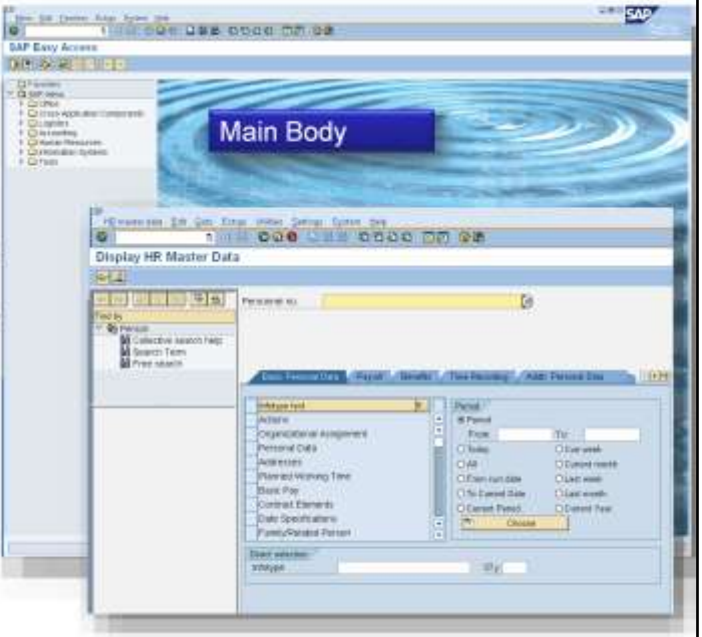
Favorites Menu Tree

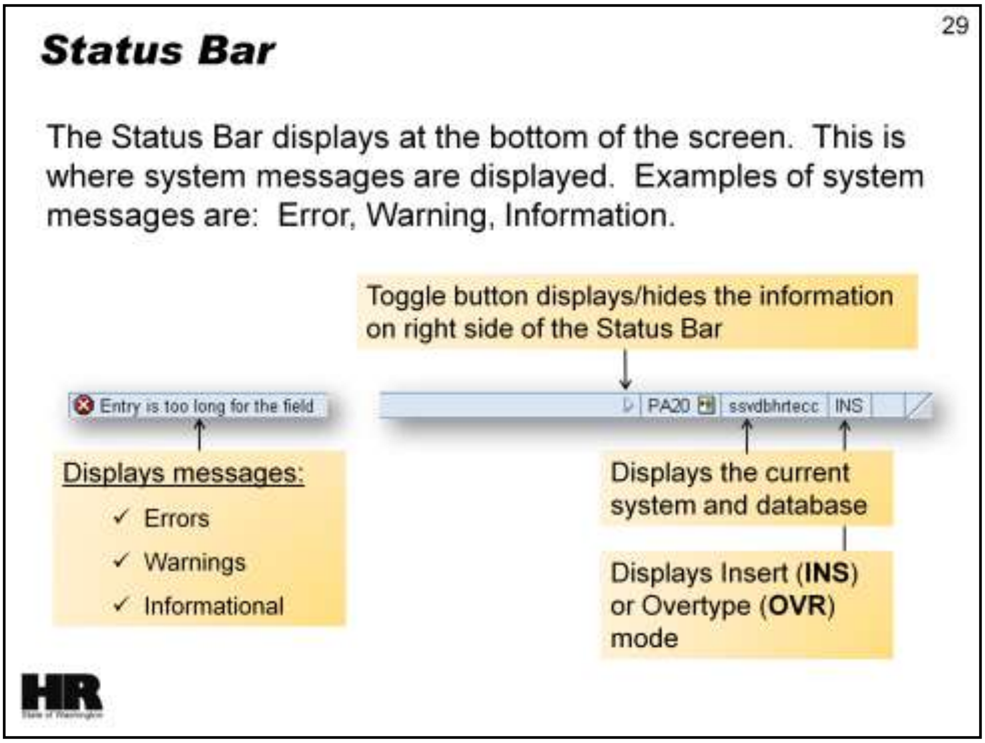
SAP Menu Tree

- The SAP Easy Access screen shows two menu trees:
  - **Favorites** and the **SAP** menu.
- The **Favorites** menu allows you to access items that you use frequently (transactions, reports, files, and website addresses).
- The **SAP** menu is used to access functional areas of HRMS.

Main Body

- The Main body is the largest part of the screen.
- The Main body changes from a water view to the screen view once a transaction is entered in the command field.


SAP Easy Access
Main Body
Display HR Master Data
Collective search help
Search Term
Free search
Personnel no.
Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal Data
Infotype text
Actions
Organizational Assignment
Personal Data
Addresses
Planned Working Time
Basic Pay
Contract Elements
Date Specifications
Family/Related Person
Period
From
To
Today
All
Choose
Direct selection
Infotype



Status Bar

The Status Bar displays at the bottom of the screen. This is where system messages are displayed. Examples of system messages are: Error, Warning, Information.

Toggle button displays/hides the information on right side of the Status Bar

Entry is too long for the field

Displays messages:

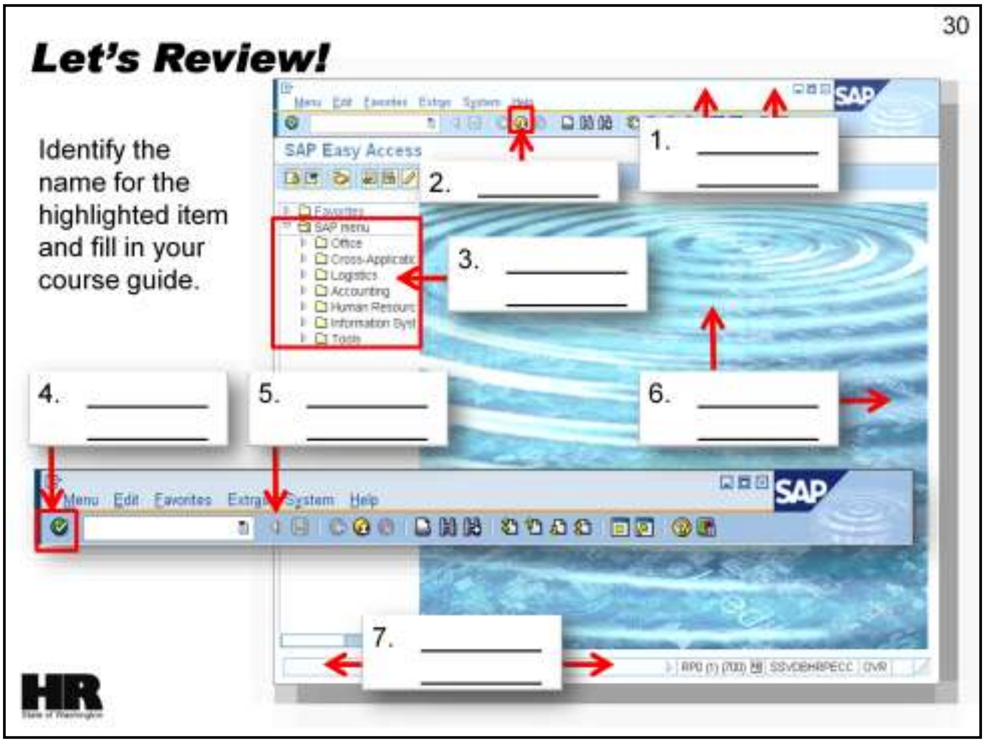
- ✓ Errors
- ✓ Warnings
- ✓ Informational

Displays the current system and database

Displays Insert (**INS**) or Overtype (**OVR**) mode

- ✓ The Overtype (OVR) mode is when you type over characters in a field.
- ✓ The Insert (INS) mode is when you can insert characters in a field.
- ✓ These two functions work like they do in Microsoft Word.
- ✓ You select these modes from your keyboard by toggling the “Ins” key.

Instructor – *We will cover system messages in more detail at the end of this course.*



Let's Review!

Identify the name for the highlighted item and fill in your course guide.

1. ____________ ____________

2. ____________

3. ____________ ____________

4. ____________ ____________

5. ____________ ____________

6. ____________ ____________

7. ____________ ____________

Menu Edit Favorites Extras System Help
SAP Easy Access
Favorites
SAP menu
Office
Cross-Applicatio
Logistics
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Human Resourc
Information Syst
Tools
SAP
RP0 (1) (700) SSVDBHRPECC OVR
HR
State of Washington

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

1 = ____________________

2 = ____________________

3 = ____________________

4 = ____________________

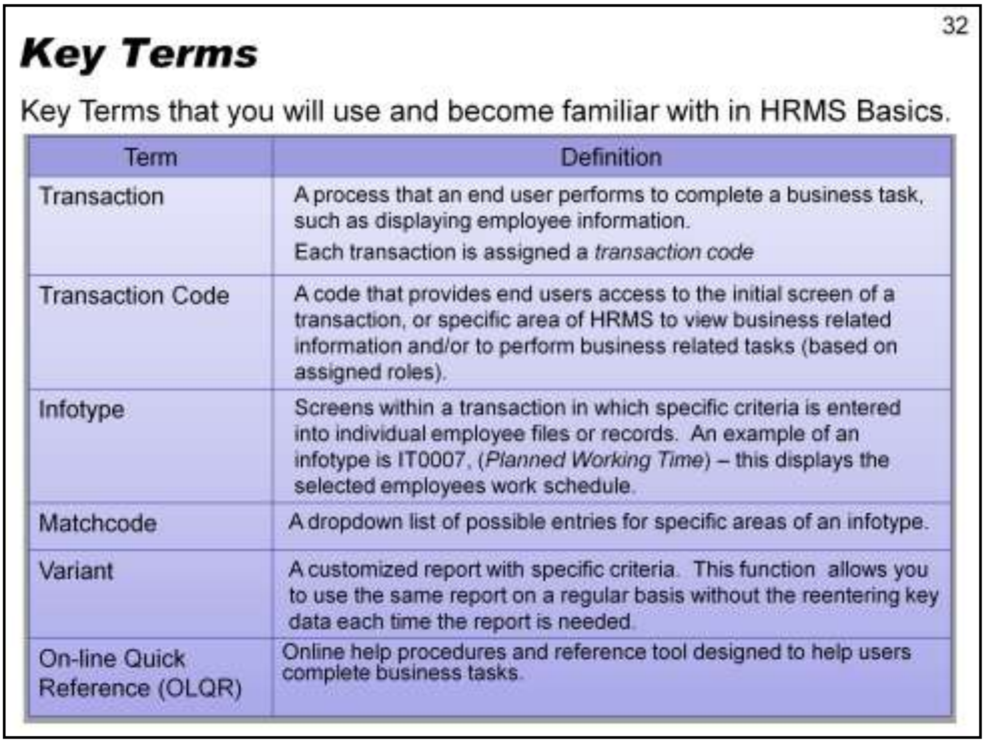
5 = ____________________

6 = ____________________

7 = ____________________

What questions do you have before we move on to the next topic?

Content Organization



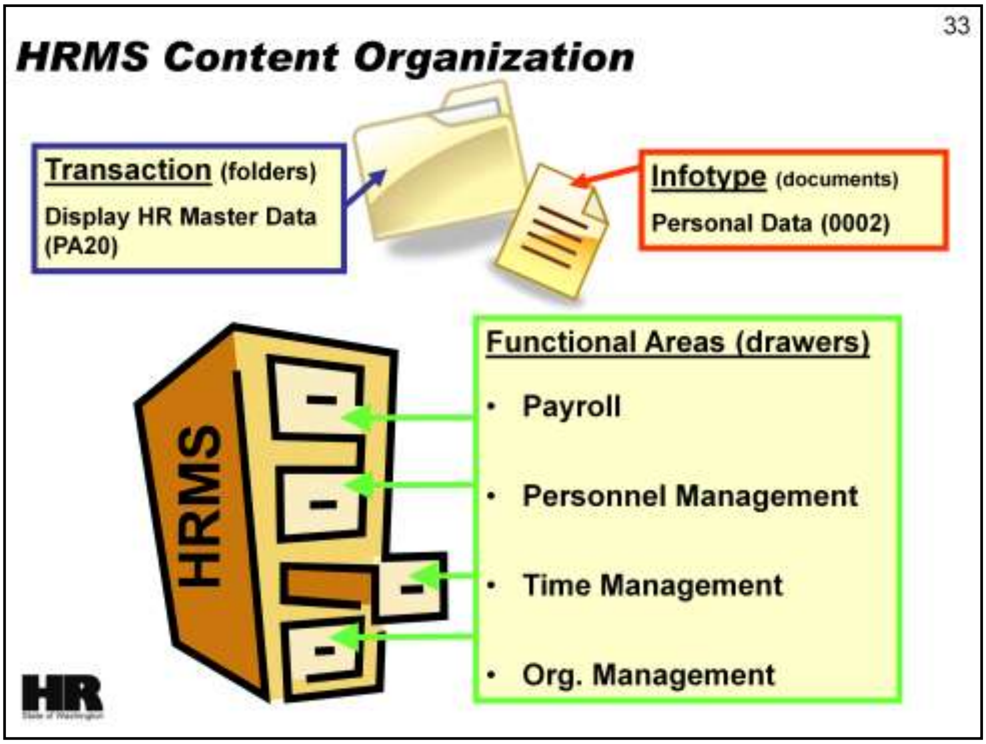
Key Terms

Key Terms that you will use and become familiar with in HRMS Basics.

Term	Definition
Transaction	A process that an end user performs to complete a business task, such as displaying employee information. Each transaction is assigned a *transaction code*
Transaction Code	A code that provides end users access to the initial screen of a transaction, or specific area of HRMS to view business related information and/or to perform business related tasks (based on assigned roles).
Infotype	Screens within a transaction in which specific criteria is entered into individual employee files or records. An example of an infotype is IT0007, (*Planned Working Time*) – this displays the selected employees work schedule.
Matchcode	A dropdown list of possible entries for specific areas of an infotype.
Variant	A customized report with specific criteria. This function allows you to use the same report on a regular basis without the reentering key data each time the report is needed.
On-line Quick Reference (OLQR)	Online help procedures and reference tool designed to help users complete business tasks.

- ✓ Only one employee may access an employee record to perform maintenance. The second employee will have display access only but will indicate it is being modified by another user.

- ✓ Examples of transaction are:
  - ✓ Running a report
  - ✓ Creating a new position
  - ✓ Updating an employee’s address



HRMS Content Organization

Transaction (folders)

Display HR Master Data (PA20)

Infotype (documents)

Personal Data (0002)

Functional Areas (drawers)

- Payroll
- Personnel Management
- Time Management
- Org. Management

This picture illustrates how content is organized in HRMS.

- ✓ Look at HRMS as a filing system where HRMS is the file cabinet.
- ✓ The drawers of the file cabinet are different functional areas (e.g. Personnel Management).
- ✓ The file folders are the different transactions that an end user can perform (e.g. Display HR Master Data – PA20).
- ✓ The documents in a particular file folder are the infotypes that allow an end user to complete a transaction e.g. (Personal Data infotype 0002).

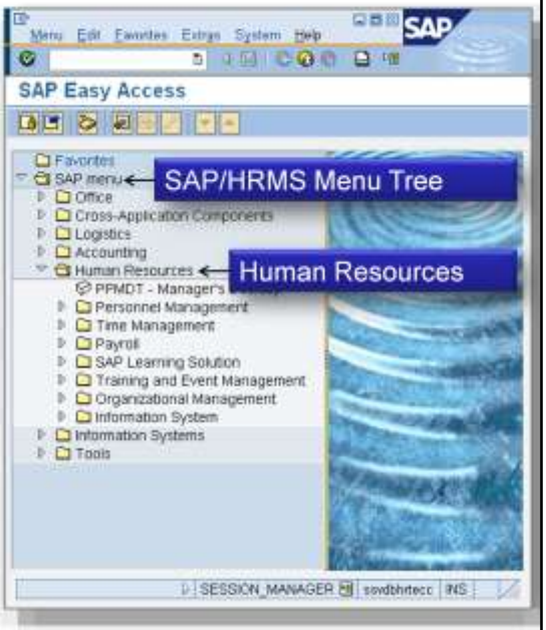
SAP/HRMS Menu

The menu consists of seven folders. Each folder covers a different aspect of business.

The Human Resources folder has six folders. Each folder is associated to a different functional area.

For employee security, access to transactions within folders is determined by role assignment.

For example, a Personnel Administration Inquirer receives access to transactions in the Personnel Management folder.



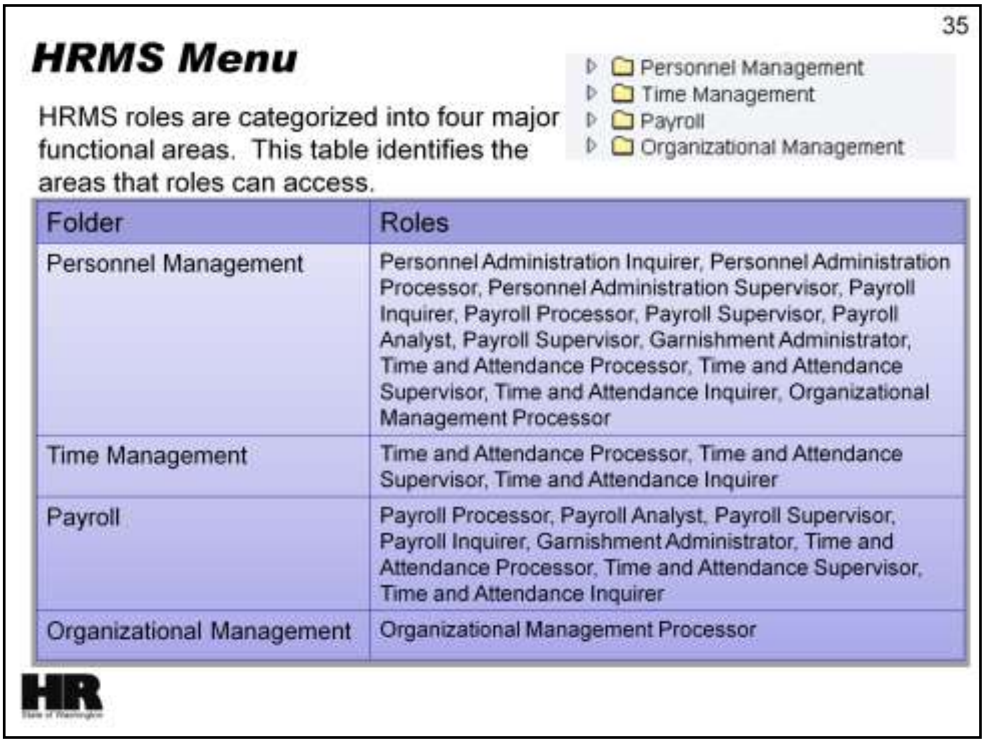
SAP/HRMS Menu Tree

Human Resources

Menu Edit Favorites Extras System Help
SAP
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's
Personnel Management
Time Management
Payroll
SAP Learning Solution
Training and Event Management
Organizational Management
Information System
Information Systems
Tools
SESSION_MANAGER
sovdbhrtecc
INS

- ✓ While SAP is an enterprise package, it encompasses other business functions besides HR and payroll. While we are not utilizing all these functions at this time, they are available for future upgrades.
- ✓ SAP – Systems Applications & Products in Data Processing
- ✓ HRMS – Human Resource Management System
- ✓ The State of Washington has purchased the Human Resource package within the SAP Menu. This package consists of 6 functional areas in which we hire and pay an employee.

- ✓ Note: There are other agencies who have purchased an additional component of SAP. The Department of Fish & Wildlife has purchased the Accounting package. Health Care Authority will be using SAP for their Benefits package. The State of Washington may look into purchasing this in the future.



HRMS Menu

HRMS roles are categorized into four major functional areas. This table identifies the areas that roles can access.

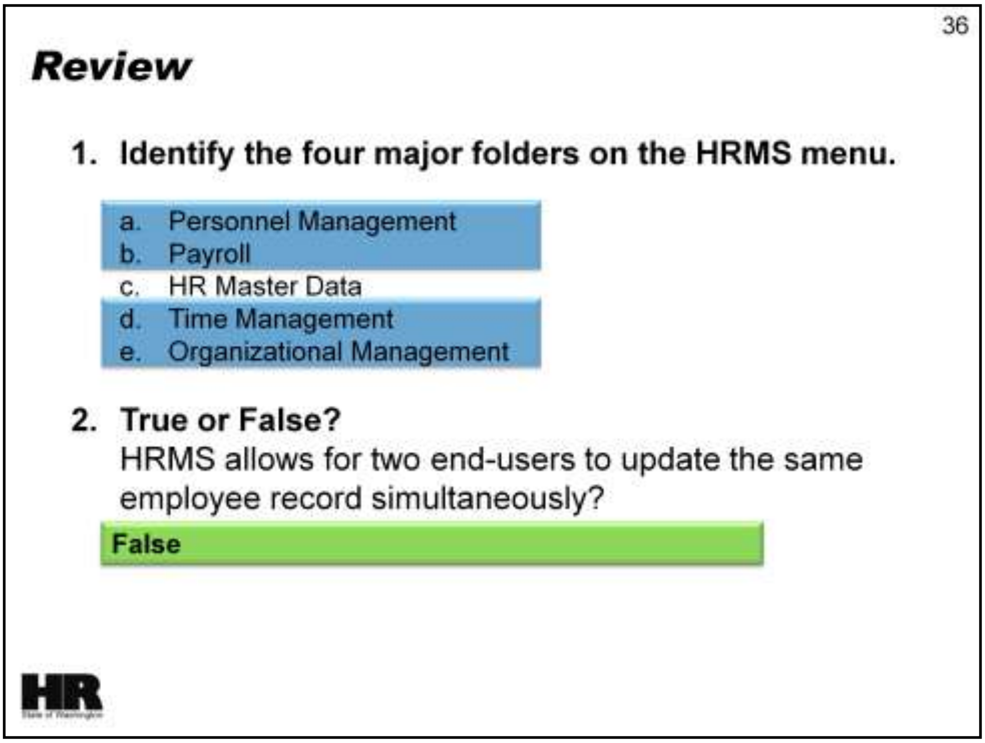
Personnel Management
Time Management
Payroll
Organizational Management

Folder	Roles
Personnel Management	Personnel Administration Inquirer, Personnel Administration Processor, Personnel Administration Supervisor, Payroll Inquirer, Payroll Processor, Payroll Supervisor, Payroll Analyst, Payroll Supervisor, Garnishment Administrator, Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer, Organizational Management Processor
Time Management	Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer
Payroll	Payroll Processor, Payroll Analyst, Payroll Supervisor, Payroll Inquirer, Garnishment Administrator, Time and Attendance Processor, Time and Attendance Supervisor, Time and Attendance Inquirer
Organizational Management	Organizational Management Processor

- ✓ The employee's mapped position determines what role is assigned and the level of HRMS access available. The role is based on the typical duties the employee performs.
- ✓ This means that while some people within the organization will have access to certain HRMS transactions (such as hiring an employee), others only have the ability to view the information that is entered while hiring an employee.
- ✓ Roles verify that the appropriate people have access to viewing and changing information – securing the system.

Question:

Who knows what role(s) they will have in HRMS?



Review

1. **Identify the four major folders on the HRMS menu.**
   - a. Personnel Management
   - b. Payroll
   - c. HR Master Data
   - d. Time Management
   - e. Organizational Management
2. **True or False?**
   HRMS allows for two end-users to update the same employee record simultaneously?
   False

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

- **Question 1:** Personnel Management, Payroll, Time Management, and Organizational Management are the four major folders on the HRMS menu.
- **Question 2:** FALSE

What questions do you have before we move on?

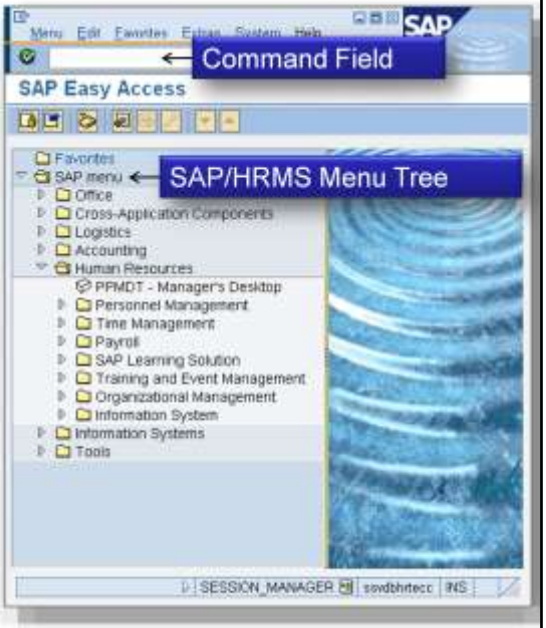
Basic Navigation

Accessing Transactions

- A transaction is a set of processes used to complete a business task, such as viewing employee information.
- There are two ways to access transactions in HRMS.
  - HRMS menu (SAP menu)

  or

  - Command Field

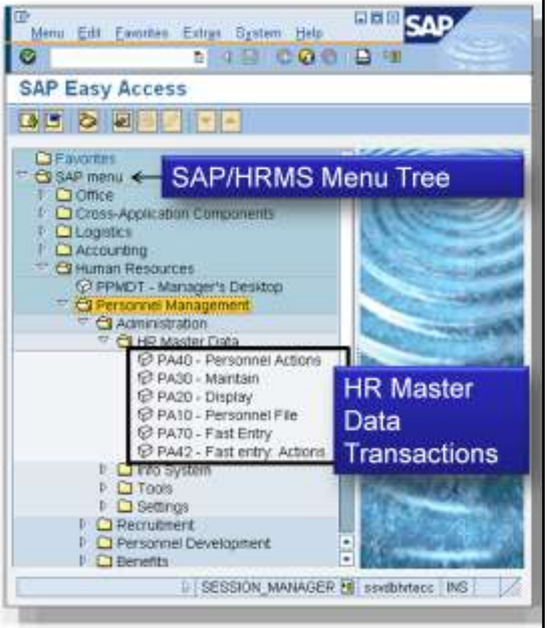

Menu Edit Favorites Extras System Help
SAP
Command Field
SAP Easy Access
Favorites
SAP menu
SAP/HRMS Menu Tree
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Time Management
Payroll
SAP Learning Solution
Training and Event Management
Organizational Management
Information System
Information Systems
Tools
SESSION_MANAGER
sovdbhrtecc
INS

SAP/HRMS Menu Tree

The HRMS menu on the SAP Easy Access screen allows you to navigate to transactions within HRMS.

Each transaction in HRMS is assigned a transaction code. These codes provide you access to a transaction's initial screen.

> Transaction codes can be initiated by double clicking a folder until the "cubes" display indicating transactions. This is called the 'drill-down' method.


Menu
Edit
Favorites
Extras
System
Help
SAP
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions
Info System
Tools
Settings
Recruitment
Personnel Development
Benefits
SESSION_MANAGER
ssvdbhrtecc
INS

SAP/HRMS Menu Tree

HR Master Data Transactions

Instructor: Refer to Job Aids, Supervisor Roles and Inquirer Roles

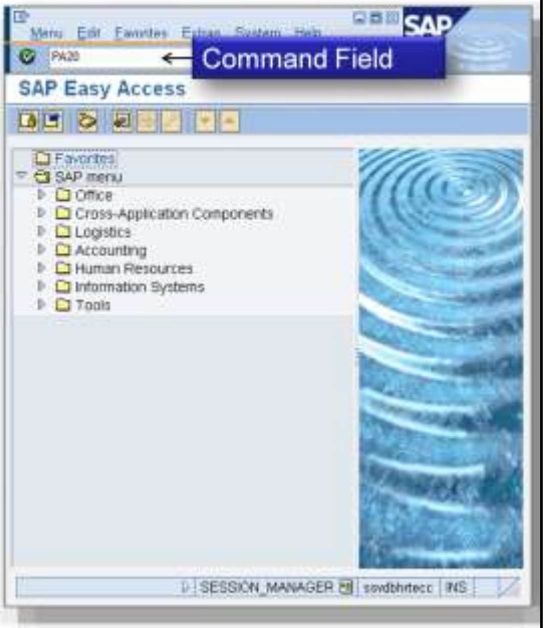
Command Field Navigation

The Command field is located on the Standard Toolbar. Use the Command field to access transactions directly using transaction codes.

Each HRMS transaction is assigned a transaction code. These codes provide you access to a transaction's initial screen.

Type PA20 (Display HR Master Data) in the command field to access employee data.

Click ✓ (**Enter**)


Menu
Edit
Favorites
Extras
System
Help
SAP
Command Field
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
Information Systems
Tools
SESSION_MANAGER
sovdbhrtecc
INS

PA20

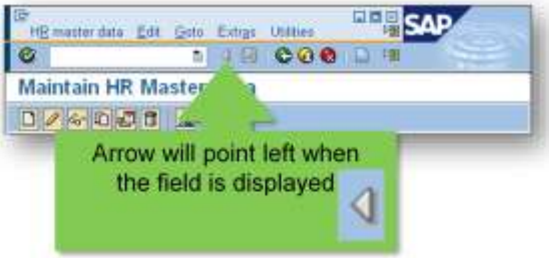
Instructor: You will learn about specific transaction codes in the functional training courses.

Command Field Navigation (con't)

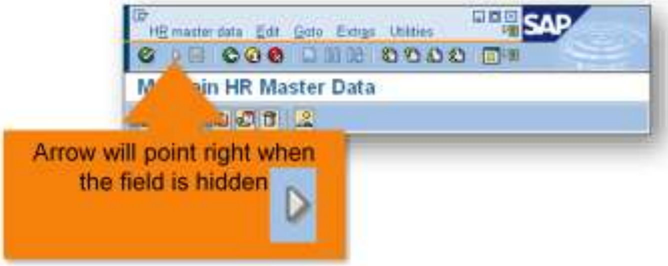
The Command field has a toggle feature which can hide or unhide the field.

To hide the Command field, click the small white arrow just outside of the Command field box.

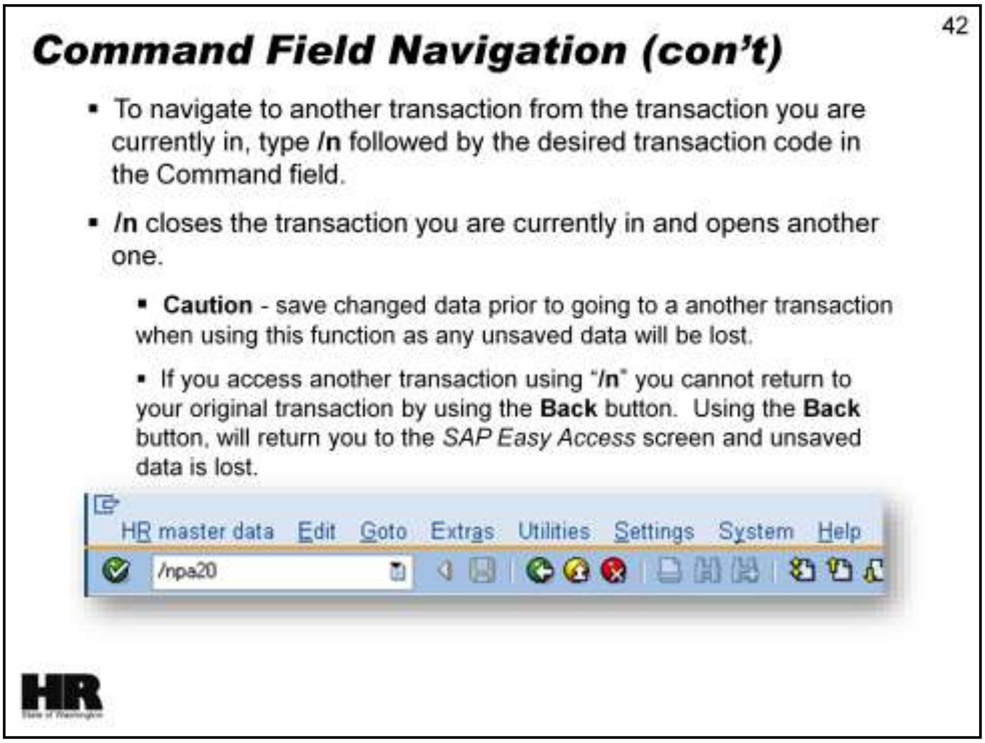
Do the same to unhide the Command field.


HR master data Edit Goto Extras Utilities
SAP
Maintain HR Master Data

Arrow will point left when the field is displayed


HR master data Edit Goto Extras Utilities
SAP
Maintain HR Master Data

Arrow will point right when the field is hidden



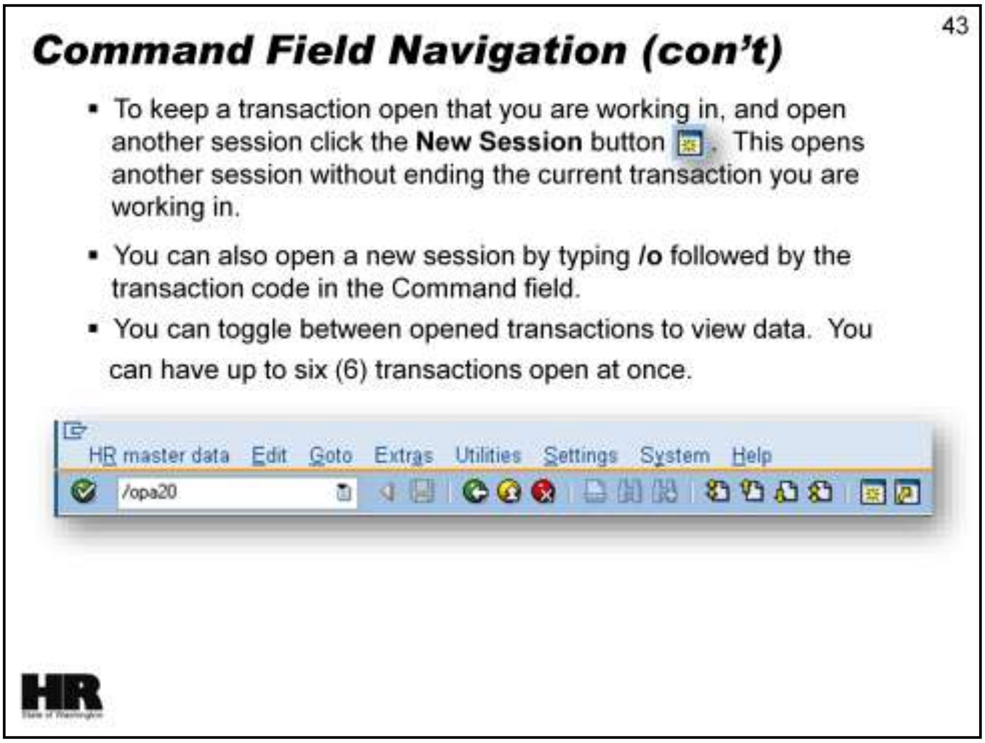
Command Field Navigation (con't)

- To navigate to another transaction from the transaction you are currently in, type **/n** followed by the desired transaction code in the Command field.
- **/n** closes the transaction you are currently in and opens another one.
  - **Caution** - save changed data prior to going to a another transaction when using this function as any unsaved data will be lost.
  - If you access another transaction using "**/n**" you cannot return to your original transaction by using the **Back** button. Using the **Back** button, will return you to the *SAP Easy Access* screen and unsaved data is lost.

/npa20

- ✓ **/n** closes the transaction you are currently in and opens another one.
  - ✓ Save changed data prior to going to another transaction using this function. Unsaved data will be lost.

- ✓ Tip to remember: N = New



Command Field Navigation (con't)

- To keep a transaction open that you are working in, and open another session click the **New Session** button ▣. This opens another session without ending the current transaction you are working in.
- You can also open a new session by typing **/o** followed by the transaction code in the Command field.
- You can toggle between opened transactions to view data. You can have up to six (6) transactions open at once.

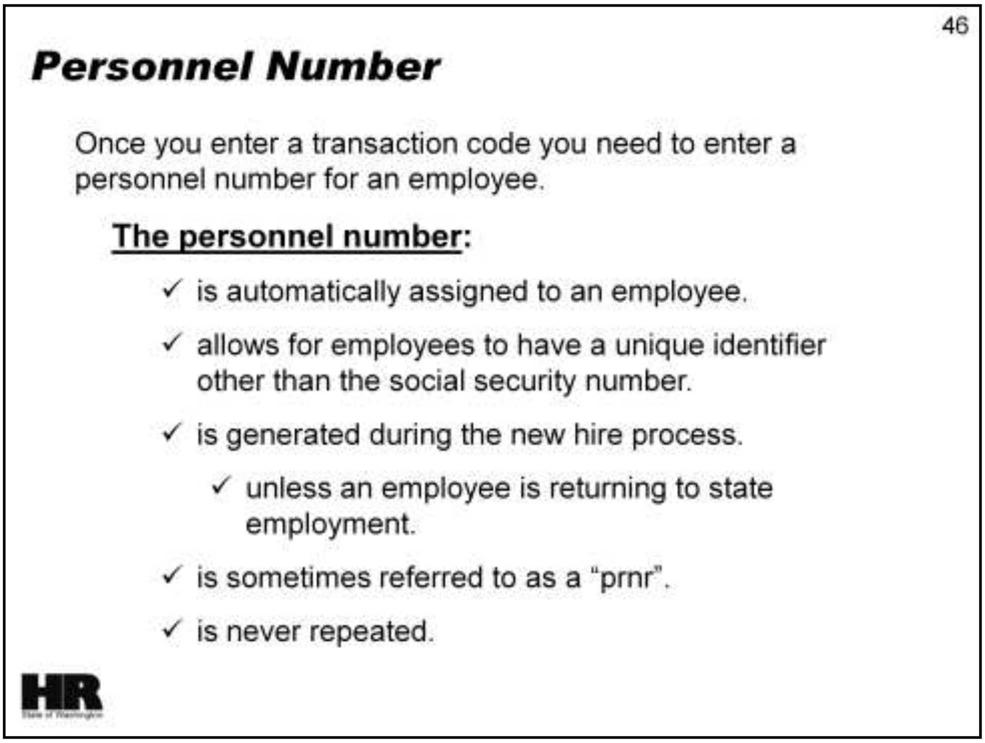
/opa20

- ✓ A new session works the same way as opening a new Word document. In Word, you can open two word documents and navigate between the two documents simultaneously. In HRMS, opening a new session works the same way. For example you may want to see an employee's Bank Details (0009) and Recurring Payment and Deductions (0014) at the same time. To do this, open one session to view Bank Details (0009) and another to view Recurring Payments and Deductions (0014).
- ✓ If you are using the WEB Gui to access HRMS, you can only have one session open at a time. Opening another browser window will not allow you to log into another session.
- ✓ You cannot have 2 windows open to "maintain" or edit employee's records. However you may have one in "display" mode and the other in "maintain" mode.
- ✓ Tip to remember: O = Open

HRMS Activity

Navigating using the HRMS Menu
Activity - Page 5

Personnel Numbers



Personnel Number

Once you enter a transaction code you need to enter a personnel number for an employee.

The personnel number:

- ✓ is automatically assigned to an employee.
- ✓ allows for employees to have a unique identifier other than the social security number.
- ✓ is generated during the new hire process.
  - ✓ unless an employee is returning to state employment.
- ✓ is sometimes referred to as a “prnr”.
- ✓ is never repeated.

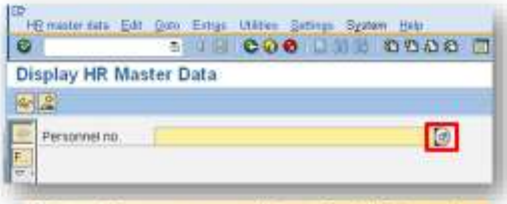
- ✓ Concurrent Employment
  - ✓ During a Concurrent Employment action a Reference Personnel Number is created.
  - ✓ A Concurrent Employment action is performed when an employee in your personnel area works for two different agencies.
  - ✓ OR if the employee works for the same agency and working in two positions where one is salaried and the other is hourly.

- ✓ Personnel Numbers
  - ✓ No personnel numbers are repeated - even those employees who terminate from the State employment keep their assigned personnel number.
  - ✓ If an employee works in multiple agencies, they will be assigned one primary personnel number and a reference number to maintain the employee records.
  - ✓ Be sure to check the Data Warehouse for employees who have worked with the state in the past. Also, be sure to always search for the employee in HRMS before creating a new Personnel Number.

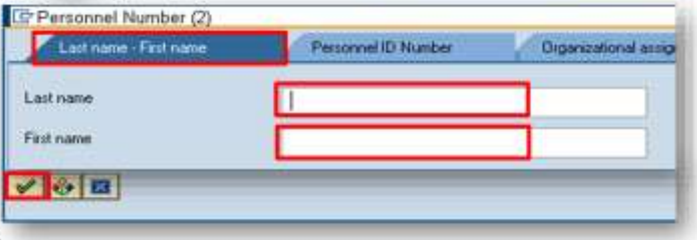
Personnel Number Search

Use transaction code **PA20**

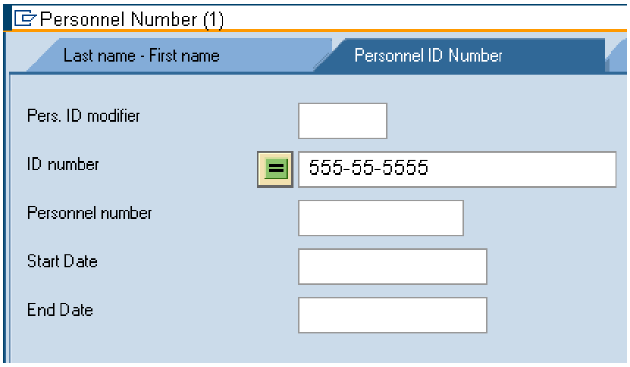
1) Click on the (**Matchcode**)
2) Click the Last name - First name (Last name – First name) tab
3) Enter the employee's last name and first name in the fields
4) Click ✓ (**Start Search)**


HR master data Edit Goto Extras Utilities Settings System Help
Display HR Master Data
Personnel no.

Note: You can search by Social Security Numbers (SSN) by selecting the '**Personnel ID Number**' tab. Enter the SSN in the ID field.


Personnel Number (2)
Last name - First name
Personnel ID Number
Organizational assig
Last name
First name

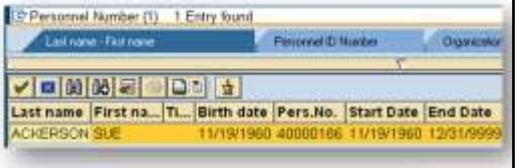
To search for an employee by Social Security Numbers (SSN) select the 'Personnel ID Number' tab. Enter the SSN in the ID field.


Personnel Number (1)
Last name - First name
Personnel ID Number
Pers. ID modifier
Personnel number
Start Date
End Date

ID number = 555-55-5555

Personnel Number Search (con't)

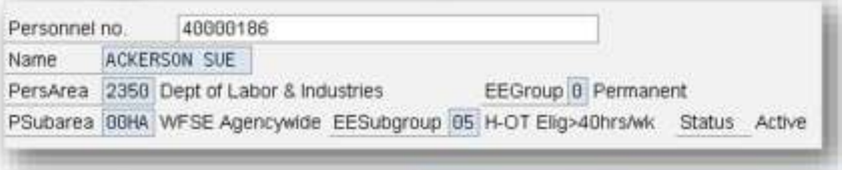
5) The results will display, click on the appropriate employee name (select the record of choice)



Personnel Number (1) 1 Entry found

Last name	First na...	Ti...	Birth date	Pers.No.	Start Date	End Date
ACKERSON	SUE		11/19/1960	40000186	11/19/1960	12/31/9999

6) Click ✓ (**Copy**) to accept



Personnel no. 40000186

Name ACKERSON SUE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

7) Click ✓ (**Enter**) to populate the employee's information into the screen

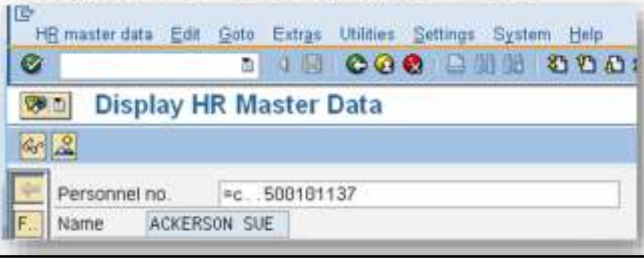
Note: The Personnel no. pop-up box may list several names. If you are searching for a common name such as, John, HRMS will return a long list of names. To identify the correct John, use the employee's birth date in the Start Date column to identify the correct record.

Alternate Search Methods

Use this search method if the Social Security is all that is known. Or in the case of a common name that will return multiple results. (ex: Johnson)

Social Security Number

- In the Personnel no. field type **=c..** followed by the Social Security number (no dashes)
  - For example type =c..500101137 and click (**Display**) to view the employee's record.


HR master data
Edit
Goto
Extras
Utilities
Settings
System
Help
Display HR Master Data

Personnel no. =c..500101137

Name ACKERSON SUE

Alternate Search Methods (con't)

Search by First Name

In the Personnel no. field type **=..** followed by the first name of the employee.

Example: The employee's first name is George. Type **=..George** and click (**Display**). A list of all employees with the first name "George" will display.

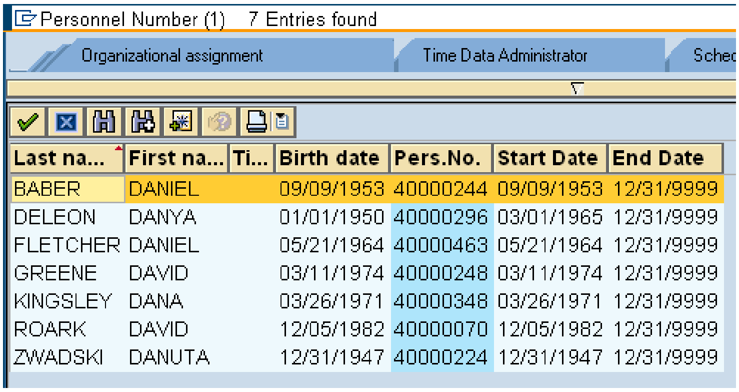
Search by Last Name

In the Personnel no. field type **=** followed by the last name of the employee.

Example: The employee's last name is Ackerson. Type **=Smith** and click (**Display**). A list of all employee with the last name "Smith" will display.

Another way to use Search by First Name (or Last Name) is to type a portion of the name followed by an asterisk.

In this example, **=..da*** will display the following:


Personnel Number (1) 7 Entries found
Organizational assignment
Time Data Administrator
Schec

Last na...	First na...	Ti...	Birth date	Pers.No.	Start Date	End Date
BABER	DANIEL		09/09/1953	40000244	09/09/1953	12/31/9999
DELEON	DANYA		01/01/1950	40000296	03/01/1965	12/31/9999
FLETCHER	DANIEL		05/21/1964	40000463	05/21/1964	12/31/9999
GREENE	DAVID		03/11/1974	40000248	03/11/1974	12/31/9999
KINGSLEY	DANA		03/26/1971	40000348	03/26/1971	12/31/9999
ROARK	DAVID		12/05/1982	40000070	12/05/1982	12/31/9999
ZWADSKI	DANUTA		12/31/1947	40000224	12/31/1947	12/31/9999

Alternate Search Methods (con't)

Use an asterisk * as a Wildcard

If you know the first letter of the last name (or first name) but are unsure of the correct spelling, type in the first letter or two followed by an asterisk (*). A list of names starting with these letters will be displayed.

Search by the middle part of a name

The wildcard (*) can be used in many different ways. At the beginning of a name, at the end of the name, in the middle of the name.

Examples: *ale = Dale, Gale, etc.
u = Sue, Julie, Justin, Nguyen
pete* = Peterson, Petes, Petersburg

HRMS Activity

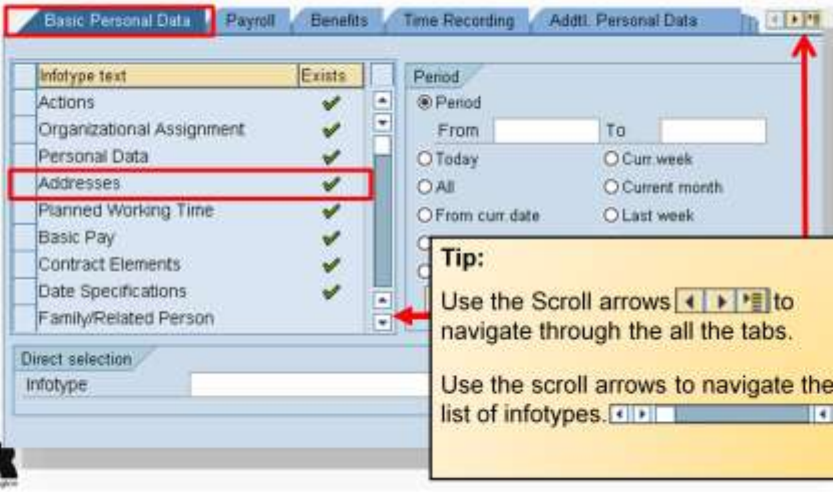
Searching for Personnel Numbers
Activity - Page 6

Accessing Infotypes

Navigating Infotypes

An infotype is a screen within a transaction in which employee information is ***displayed*** or ***maintained***.

Infotypes are organized under tabs. For example; the ***Addresses*** infotype falls under the **Basic Personal Data** tab.



Basic Personal Data
Payroll
Benefits
Time Recording
Addtl. Personal Data

Infotype text	Exists
Actions	✓
Organizational Assignment	✓
Personal Data	✓
Addresses	✓
Planned Working Time	✓
Basic Pay	✓
Contract Elements	✓
Date Specifications	✓
Family/Related Person	

Period

● Period

From To

○ Today ○ Curr.week

○ All ○ Current month

○ From curr.date ○ Last week

Direct selection

Infotype

Tip:

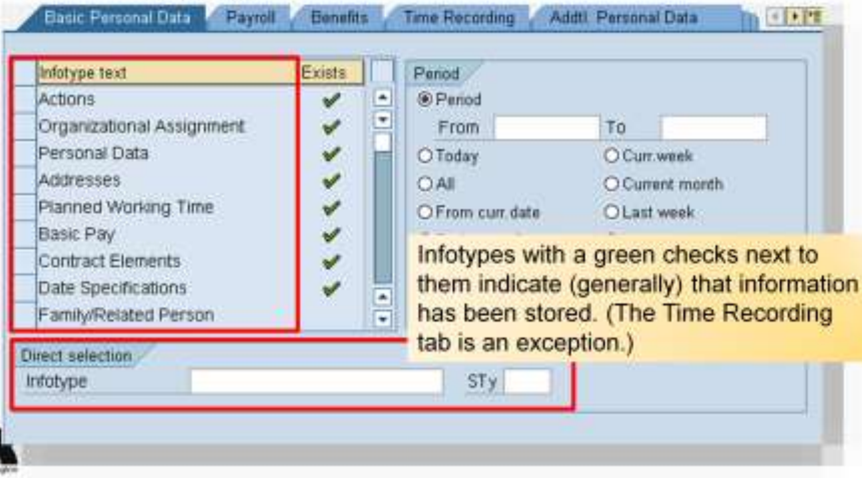
Use the Scroll arrows to navigate through the all the tabs.

Use the scroll arrows to navigate the list of infotypes.

Accessing Infotypes (con't)

To access an infotype after you have entered the personnel number, choose one of these methods:

Method # 1 - Click the gray box *left of* the desired infotype text
Method # 2 - Use Direct selection by typing in the specific infotype name or number

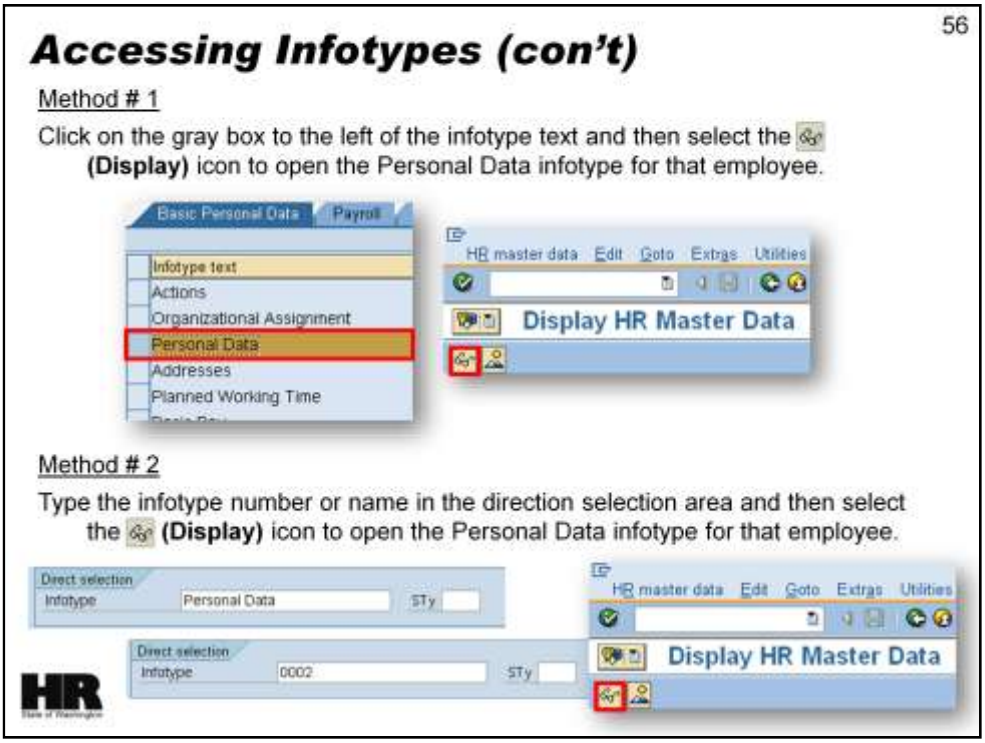


Infotype text	Exists
Actions	✓
Organizational Assignment	✓
Personal Data	✓
Addresses	✓
Planned Working Time	✓
Basic Pay	✓
Contract Elements	✓
Date Specifications	✓
Family/Related Person	

Period
● Period
From ☐ To ☐
○ Today ○ Curr.week
○ All ○ Current month
○ From curr.date ○ Last week

Direct selection
Infotype ☐ STy ☐

Infotypes with a green checks next to them indicate (generally) that information has been stored. (The Time Recording tab is an exception.)



Accessing Infotypes (con't)

Method # 1

Click on the gray box to the left of the infotype text and then select the **(Display)** icon to open the Personal Data infotype for that employee.

Basic Personal Data
Payroll
Infotype text
Actions
Organizational Assignment
Personal Data
Addresses
Planned Working Time
HR master data
Edit
Goto
Extras
Utilities
Display HR Master Data

Method # 2

Type the infotype number or name in the direction selection area and then select the **(Display)** icon to open the Personal Data infotype for that employee.

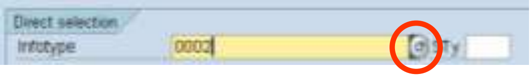
Direct selection
Infotype: Personal Data

Direct selection
Infotype: 0002

STy
STy
HR master data
Edit
Goto
Extras
Utilities
Display HR Master Data

Tip:

For a list of infotype names and numbers, click the **(matchcode)** button next to the infotype field .

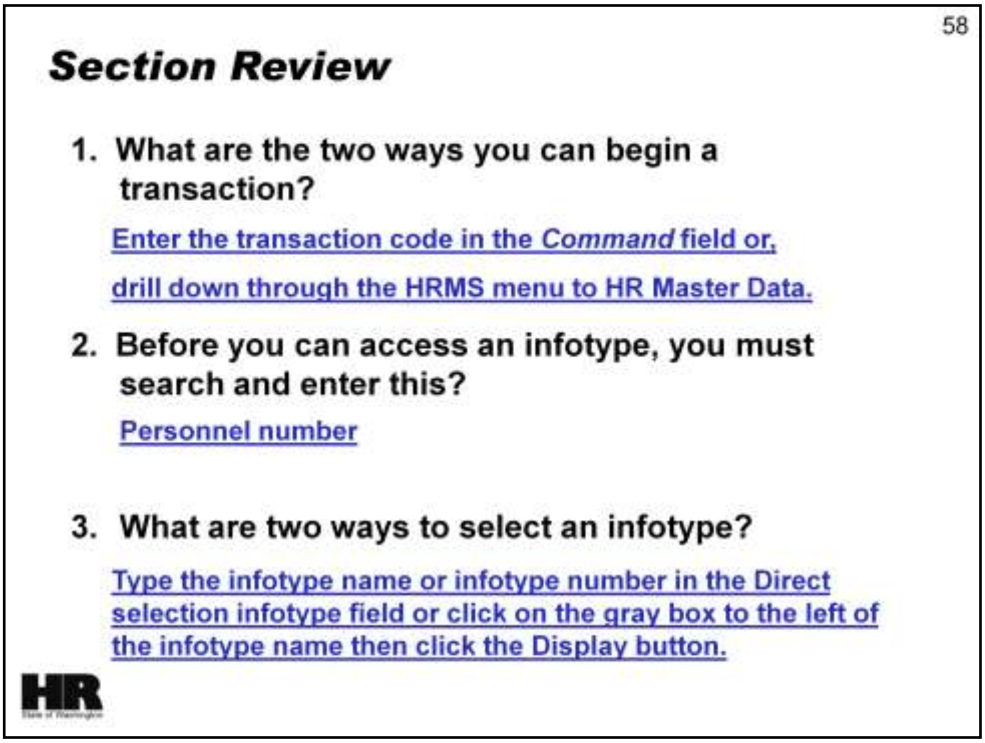


Direct selection
Infotype: 0002

The list can be printed for reference. You can sort the columns in ascending or descending order by clicking on the column heading.

HRMS Activity

Navigating with Infotypes
Activity - Page 7



Section Review

1. What are the two ways you can begin a transaction?

   Enter the transaction code in the *Command* field or,

   drill down through the HRMS menu to HR Master Data.

2. Before you can access an infotype, you must search and enter this?

   Personnel number

3. What are two ways to select an infotype?

   Type the infotype name or infotype number in the Direct selection infotype field or click on the gray box to the left of the infotype name then click the Display button.

Allow the class time to write out the answers to the review questions **before** displaying/discussing the answers**.**

Answers:

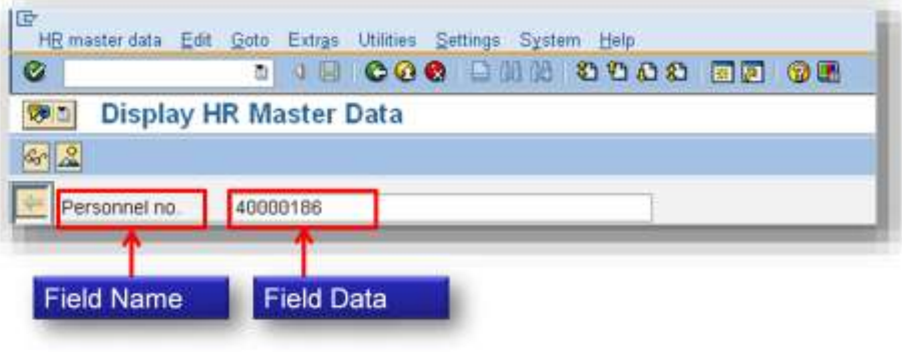
- ✓ **Question 1**: Enter PA20 in the Command field or drill-down to “HR Master Data” from the HRMS menu.
- ✓ **Question 2:** You must search and enter a personnel number to access an infotype.
- ✓ **Question 3**: Type the infotype name or infotype number in the Direction selection field or click on the gray box to the left on infotype name then click the Display button.

What questions do you have before we move on?

Types of HRMS Fields

Types of HRMS Fields

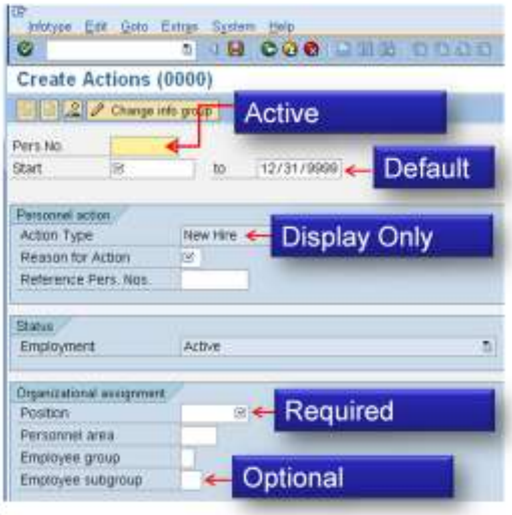
A field is composed of a field name and field data. The ***field name*** describes the field, while the ***field data*** provides specific information that you either view or enter data.


HR master data
Edit
Goto
Extras
Utilities
Settings
System
Help
Display HR Master Data
Field Name
Field Data

Personnel no. 40000186

Types of HRMS Fields

1. **Active field** is the field your cursor is currently in. It changes as you move from field to field. An Active field is highlighted yellow.
2. **Default fields** contain data automatically. You may overwrite the data.
3. **Display Only** fields provide information and cannot be changed. Display fields are grayed out.
4. **Required fields** must be populated with valid data before moving on to the next screen.
5. **Optional fields** are not necessary to complete or to continue to the next screen. Your agency may require you to complete some optional fields.


Infotype Edit Goto Extras System Help
Create Actions (0000)
Change info group
Active
Default
Display Only
Required
Optional

Create Actions (0000)

Pers.No.

Start to 12/31/9999

Personnel action

Action Type New Hire

Reason for Action

Reference Pers. Nos.

Status

Employment Active

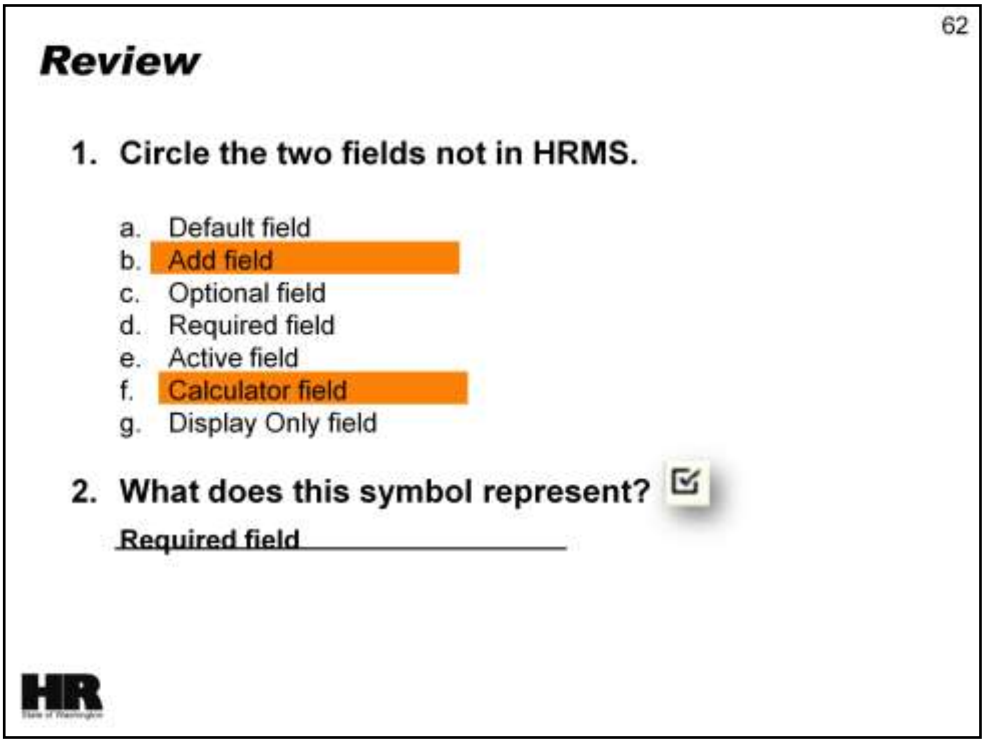
Organizational assignment

Position

Personnel area

Employee group

Employee subgroup



Review

1. Circle the two fields not in HRMS.

   a. Default field
   b. Add field
   c. Optional field
   d. Required field
   e. Active field
   f. Calculator field
   g. Display Only field

2. What does this symbol represent? ☑

   Required field

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

Question 1: b. **add field** and f. **calculator field**.

Question 2: Required field.

What questions do you have before we move on?

Customize HRMS

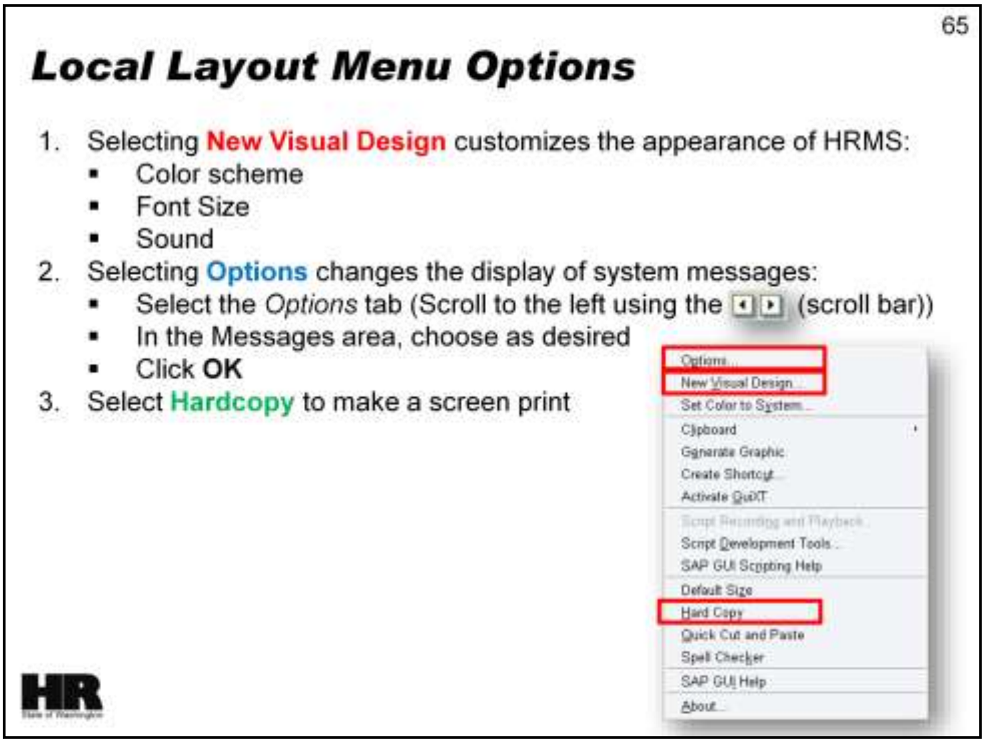
HR
State of Washington

HRMS Customization

HRMS can be customized to fit the user's business needs.

The **Local Layout** button is located on the Standard Toolbar.

- Customize your screen layout by customizing the appearance of HRMS. (agency policy dictates)
- Print a screenshot of what is currently displayed.
- Change how system messages are displayed.
- Activate the 'Quick Cut and Paste' option.



Local Layout Menu Options

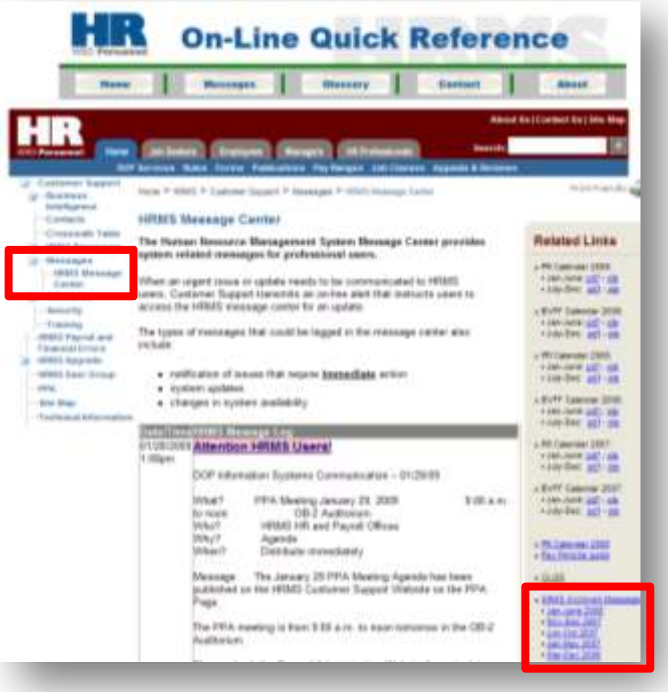
1. Selecting **New Visual Design** customizes the appearance of HRMS:
   - Color scheme
   - Font Size
   - Sound
2. Selecting **Options** changes the display of system messages:
   - Select the *Options* tab (Scroll to the left using the ◂▸ (scroll bar))
   - In the Messages area, choose as desired
   - Click **OK**
3. Select **Hardcopy** to make a screen print

Options...
New Visual Design...
Set Color to System...
Clipboard
Generate Graphic
Create Shortcut...
Activate GuiXT
Script Recording and Playback...
Script Development Tools...
SAP GUI Scripting Help
Default Size
Hard Copy
Quick Cut and Paste
Spell Checker
SAP GUI Help
About...

Reminder: The customer support page stores HRMS messages previously distributed via email.

Under the Messages tab search for this communication (***Information Systems Communication – 11/26/08)*** to read specifics detailing how to change the color theme.

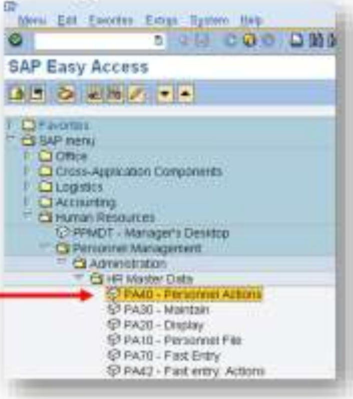
Messages are archived to folders on the right side of this page (approximately) every 90 days.

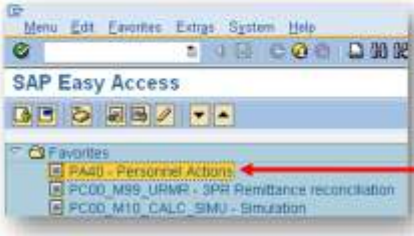

On-Line Quick Reference
Home
Messages
Glossary
Contact
About
HRMS Message Center
Related Links
Attention HRMS Users!

Favorites Menu – Click & Drag

1) Select the desired transaction or infotype you want to add
2) Click and drag the selection to the *Favorites* folder

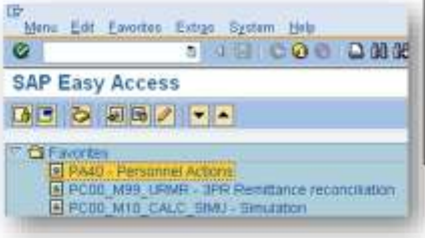
Note: When using the click and drag method, the menu path will not display in the Favorites – only the transaction code and name.

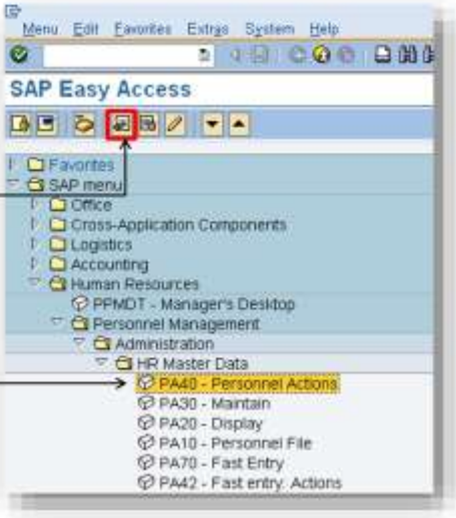

Menu
Edit
Favorites
Extras
System
Help
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions


Menu
Edit
Favorites
Extras
System
Help
SAP Easy Access
Favorites
PA40 - Personnel Actions
PC00_M99_URMR - 3PR Remittance reconciliation
PC00_M10_CALC_SIMU - Simulation

Favorites Menu – Add to Favorites

1) Select the desired transaction or infotype you want to add
2) Click on the ▣ (**Add to Favorites)** button


Menu Edit Favorites Extras System Help
SAP Easy Access
Favorites
PA40 - Personnel Actions
PC00_M99_URMR - 3PR Remittance reconciliation
PC00_M10_CALC_SIMU - Simulation


Menu Edit Favorites Extras System Help
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain
PA20 - Display
PA10 - Personnel File
PA70 - Fast Entry
PA42 - Fast entry: Actions

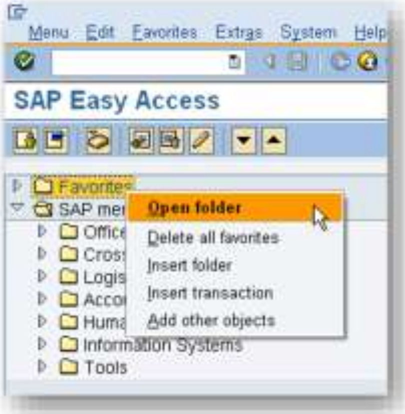
Favorites Menu – Organize

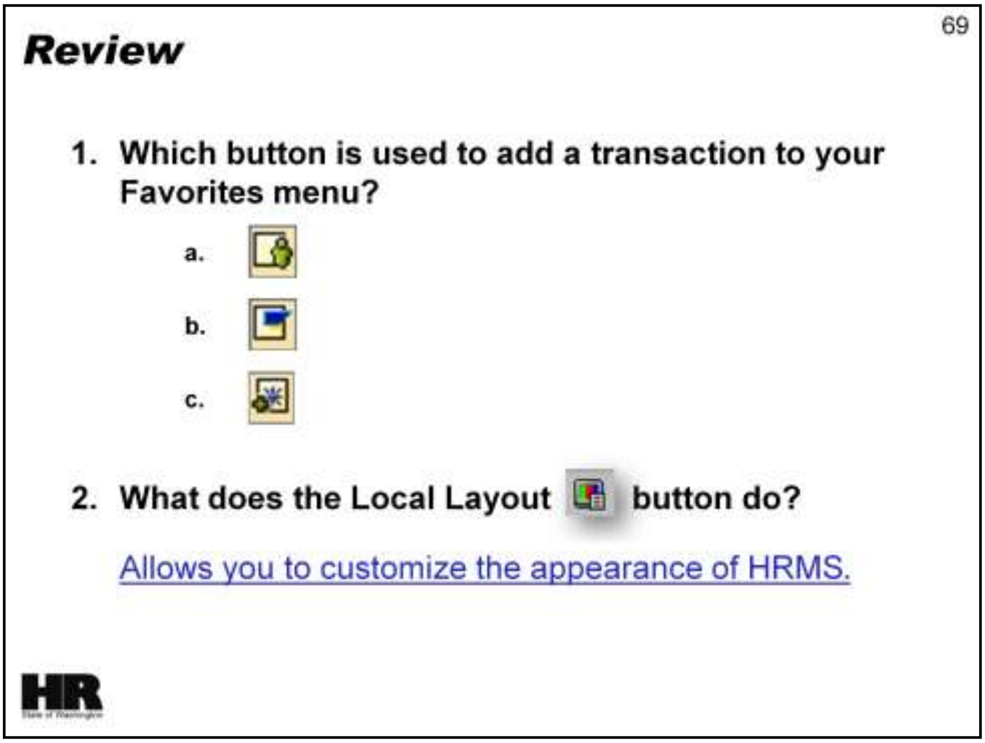
To add Sub-folders:

- Right-click on the Favorites folder and select Insert folder.
- Create a folder name and click ✓ **(Continue (Enter)).**

To add Transaction codes:

- Right-click on the Favorites folder and select Insert transaction.
- Enter the transaction code and click ✓ **(Continue (Enter)).**


Menu
Edit
Favorites
Extras
System
Help
SAP Easy Access
Favorites
SAP men
Office
Cross
Logis
Acco
Huma
Information Systems
Tools
Open folder
Delete all favorites
Insert folder
Insert transaction
Add other objects



Review

1. Which button is used to add a transaction to your Favorites menu?
   - a.
   - b.
   - c.
2. What does the Local Layout button do?

   Allows you to customize the appearance of HRMS.

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

Question 1: Answer is d. Use the **Add to Favorites** button to add a transaction to your Favorites menu.

A – User menu

B – Standard menu

C – New Session

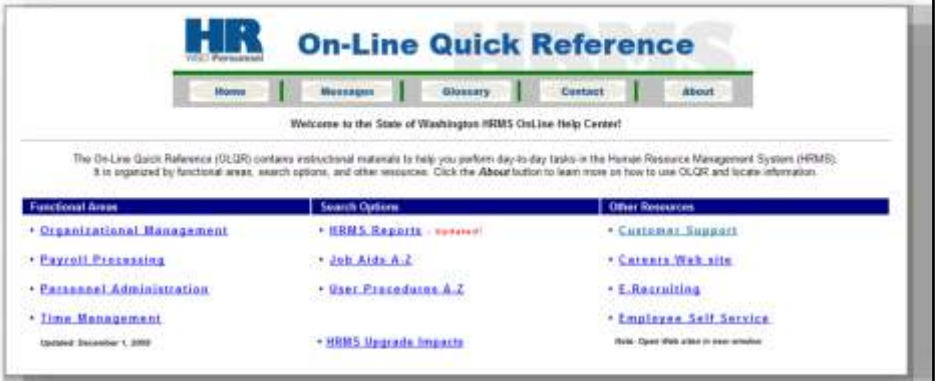
Question 2: Use the **Customizing of local Layout** button to customize the appearance of HRMS.

What questions do you have before we move on?

On-line Quick Reference (OLQR)

On-line Quick Reference (OLQR)

http://win-shrweb.dis.wa.gov/olqr/nav/index.htm



On-Line Quick Reference

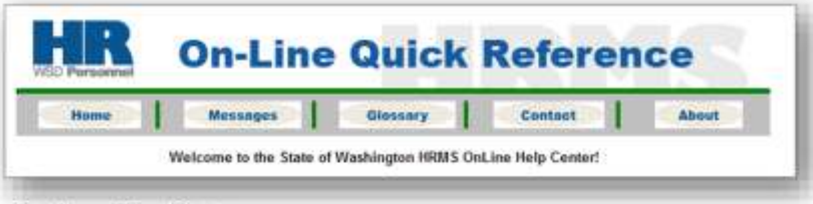
Welcome to the State of Washington HRMS OnLine Help Center!

The On-Line Quick Reference (OLQR) contains instructional materials to help you perform day-to-day tasks in the Human Resource Management System (HRMS). It is organized by functional areas, search options, and other resources. Click the **About** button to learn more on how to use OLQR and locate information.

Functional Areas	Search Options	Other Resources
• Organizational Management	• HRMS Reports - Updated!	• Customer Support
• Payroll Processing	• Job Aids A-Z	• Careers Web site
• Personnel Administration	• User Procedures A-Z	• E-Recruiting
• Time Management		• Employee Self Service
Updated: December 1, [illegible]	• HRMS Upgrade Impacts	Note: Open Web sites in new window

This tool contains a glossary, job aids a-z, system and user procedures that describe how to perform HRMS tasks step-by-step and more.

On-line Quick Reference (OLQR) (con't)


HR
WSD Personnel
On-Line Quick Reference
HRMS
Home
Messages
Glossary
Contact
About

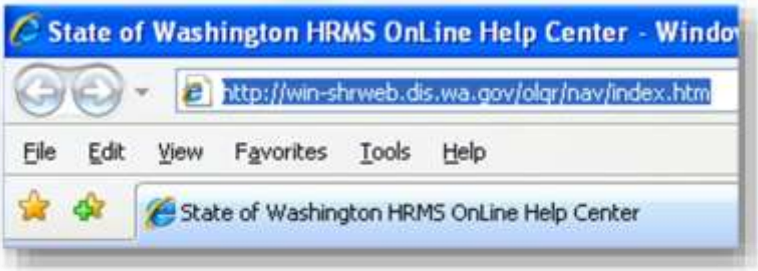
Welcome to the State of Washington HRMS OnLine Help Center!

Index Toolbar

- **Home**
- **Messages**
- **Glossary** – database of terms, field names, and definitions
- **Contact** – how to contact the ISD Help Desk
- **About** – information on navigating OLQR

Accessing OLQR through the Web

- To access the OLQR, open Internet Explorer from your desktop and type in the web address in the address field http://win-shrweb.dis.wa.gov/olqr/nav/index.htm

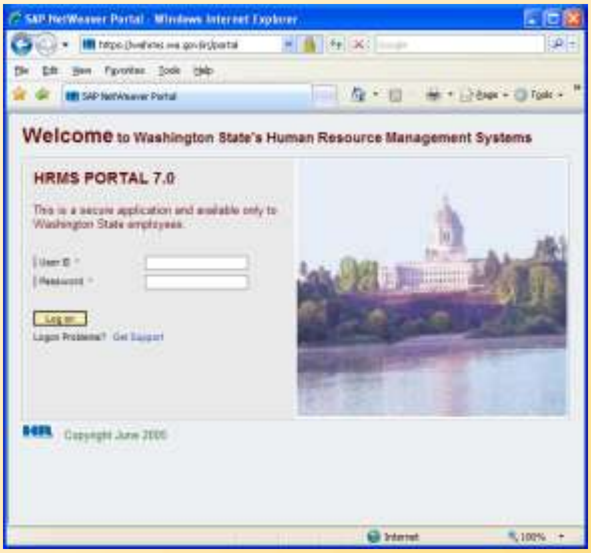

State of Washington HRMS OnLine Help Center - Windo

http://win-shrweb.dis.wa.gov/olqr/nav/index.htm

File
Edit
View
Favorites
Tools
Help
State of Washington HRMS OnLine Help Center

Instructor – This review of Web Access is intended to show users a another way some employee access SAP. It provides users a general feel of what HRMS Portal looks like. Each agency is different on how they will be accessing the HRMS Portal.

Before accessing SAP you need to pass through and log on to the HRMS Portal.


SAP NetWeaver Portal - Windows Internet Explorer

Welcome to Washington State's Human Resource Management Systems

HRMS PORTAL 7.0

This is a secure application and available only to Washington State employees.

User ID *

Password *

Log on

Logon Problems? Get Support

Copyright June 2005

File
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Favorites
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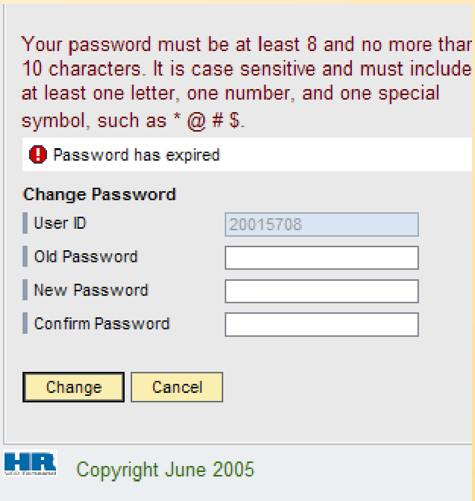
Help
SAP NetWeaver Portal
Internet
100%

The HRMS Portal complies to the same password restraints as SAP.


Your password must be at least 8 and no more than 10 characters. It is case sensitive and must include at least one letter, one number, and one special symbol, such as * @ # $.

Password has expired

Change Password

User ID 20015708

Old Password

New Password

Confirm Password

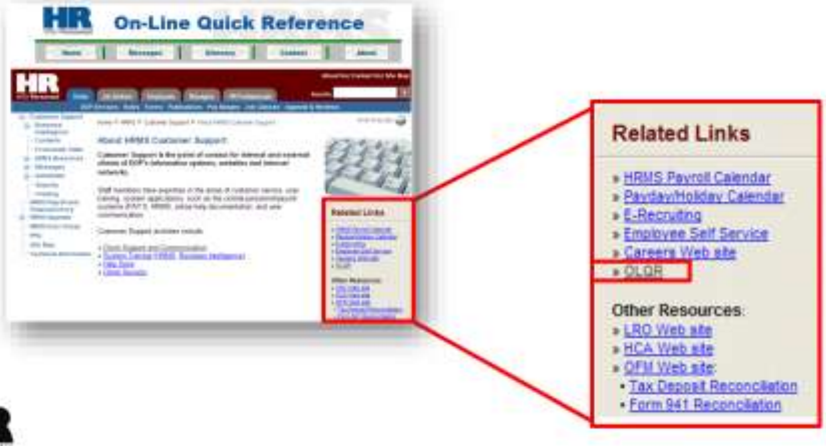
Change Cancel

Copyright June 2005

On-line Quick Reference

- The **OLQR** can also be found on the **Customer Support** website under the *Related Links* column.

http://win-shrweb.dis.wa.gov/olqr/nav/index.htm



Related Links

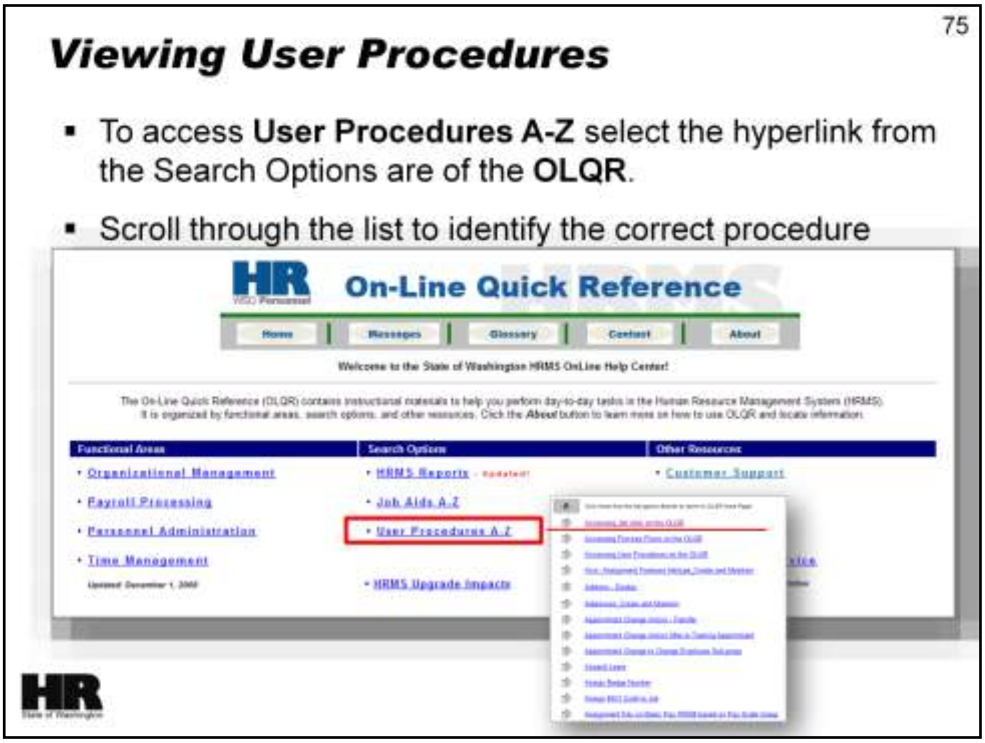
- HRMS Payroll Calendar
- Payday/Holiday Calendar
- E-Recruiting
- Employee Self Service
- Careers Web site
- OLQR

Other Resources:

- LRO Web site
- HCA Web site
- OFM Web site:
  - Tax Deposit Reconciliation
  - Form 941 Reconciliation

Instructor:

✓ Explain that the Customer Support website contains a lot of the same information that was found on the HRMS project website.



Viewing User Procedures

- To access **User Procedures A-Z** select the hyperlink from the Search Options are of the **OLQR**.
- Scroll through the list to identify the correct procedure

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Welcome to the State of Washington HRMS OnLine Help Center!

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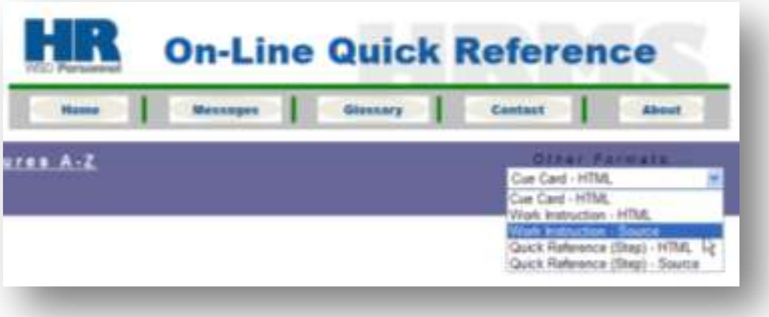
Functional Areas	Search Options	Other Resources
Organizational Management	HRMS Reports - Updated!	Customer Support
Payroll Processing	Job Aids A-Z	
Personnel Administration	User Procedures A-Z	
Time Management		
Updated: December 1, 2008	HRMS Upgrade Impacts	

HR
State of Washington



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ures A-Z
Other Formats
Cue Card - HTML
Cue Card - HTML
Work Instruction - HTML
Work Instruction - Source
Quick Reference (Step) - HTML
Quick Reference (Step) - Source

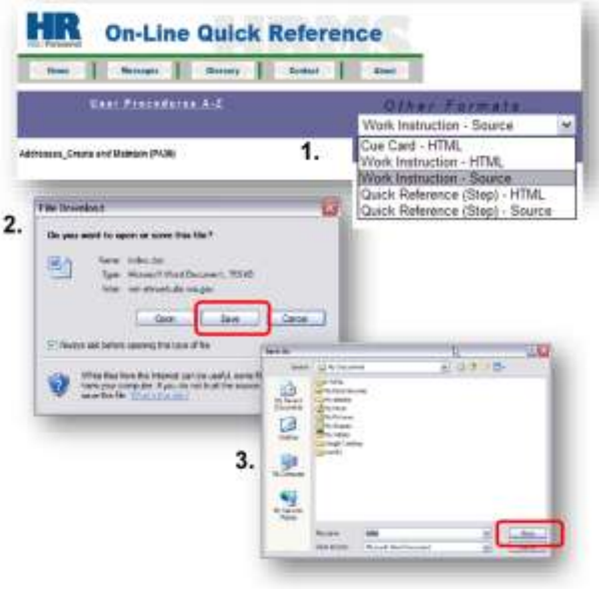
Other Formats

- ✓ Cue Card – is the default that will come up when requesting context sensitive help.
- ✓ Quick Reference Flow will provide visual of how the process will flow through HRMS and interactions with other processes.
- ✓ Quick Reference contains all the steps you will need but not screen shots. You can click on the links to view screenshots or field definition tables.
- ✓ Work Instruction are documents that say “source” after them are word documents that can be saved into your computer and then modifications can be made to them to incorporate your agency business processes, additional notes you want to add such as handoff information, timelines for when document should be processed, etc.

Saving OLQR Documents

OLQR Procedures may be saved to your computer for future references.

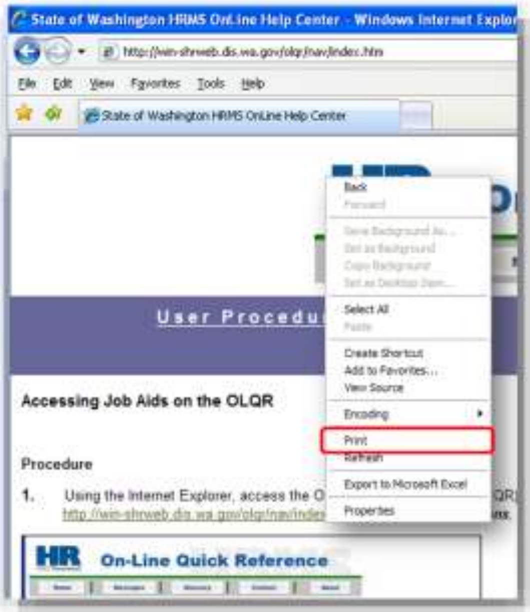
1. Once the procedure has been chosen, select the **Source** format listed under *Other Formats*
2. The File Download window will display, click **Save**
3. Rename the document, select the destination and click **Save**


On-Line Quick Reference
User Procedures A-Z
Other Formats
Work Instruction - Source
Cue Card - HTML
Work Instruction - HTML
Work Instruction - Source
Quick Reference (Step) - HTML
Quick Reference (Step) - Source
1.
File Download
2.
Save
3.

Instructor – *When saving procedures, it is very important to check the last revised date. Procedures are constantly changing and it is the agency's responsibility to update them.*

Printing OLQR Documents

- Once the procedure has been selected, **right-click** anywhere within the procedure
- Select **Print**
- Verify the print options, click **Print**


State of Washington HRMS OnLine Help Center - Windows Internet Explor
http://win-shrweb.dis.wa.gov/olqr/nav/index.htm
File Edit View Favorites Tools Help
State of Washington HRMS OnLine Help Center
Back
Forward
Save Background As...
Set as Background
Copy Background
Set as Desktop Item...
Select All
Paste
Create Shortcut
Add to Favorites...
View Source
Encoding
Print
Refresh
Export to Microsoft Excel
Properties
HR On-Line Quick Reference

User Procedu

Accessing Job Aids on the OLQR

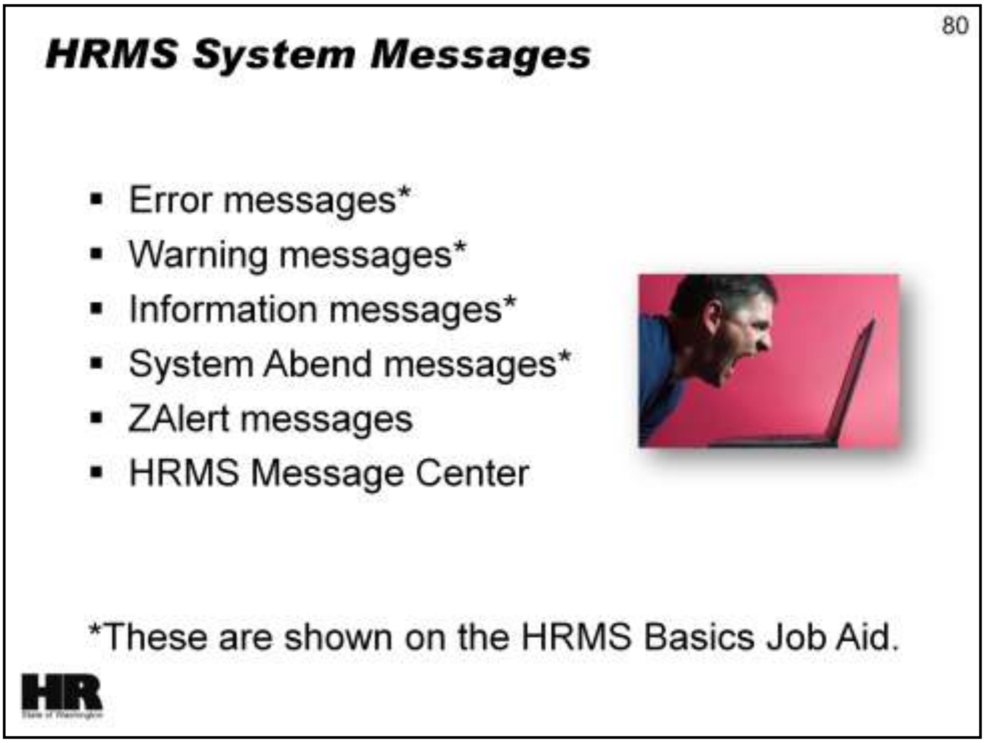
Procedure

1. Using the Internet Explorer, access the O
http://win-shrweb.dis.wa.gov/olqr/nav/index

HRMS Activity

Accessing the On-line Quick Reference
Find It! - Page 8

System Messages



HRMS System Messages

- Error messages*
- Warning messages*
- Information messages*
- System Abend messages*
- ZAlert messages
- HRMS Message Center

*These are shown on the HRMS Basics Job Aid.

Reference Job Aid

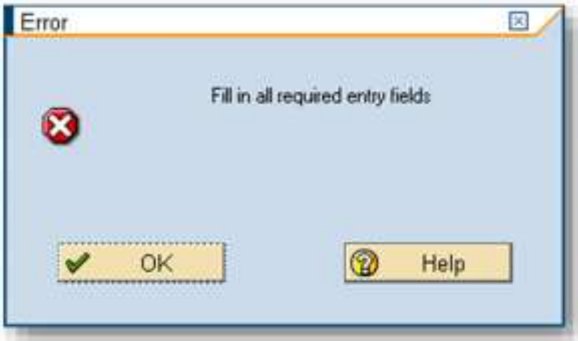
Explain preference in displaying messages:

- ✓ Dialog box at warning
- ✓ Dialog box at error
- ✓ Dialog box at success
- ✓ Or message at bottom of the screen.

Error Messages

Error messages indicate a required entry has not been made.

- If an error message appears, HRMS does not allow you to continue until you correct the error.
- System messages are indicated with an icon that identifies the type of message.
- The error message is indicated by a red stop sign. A red circle with an "X" appears on the status bar.


Error

Fill in all required entry fields

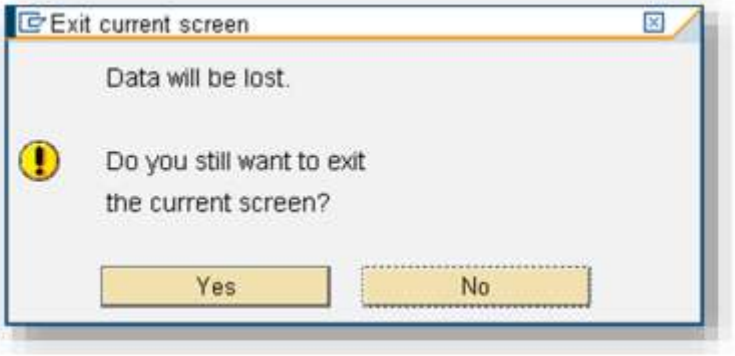
Note: To resolve an error message you need to verify that all required fields are entered.

If not, you need to complete these fields to move forward.

Warning Messages

You receive a warning message when HRMS detects a possible error.

- Verify that everything has been entered correctly, press **Enter** and continue with your work.
- The warning message is indicated by a yellow circle with an exclamation point that appears in a pop-up box and on the status bar.



Exit current screen

Data will be lost.

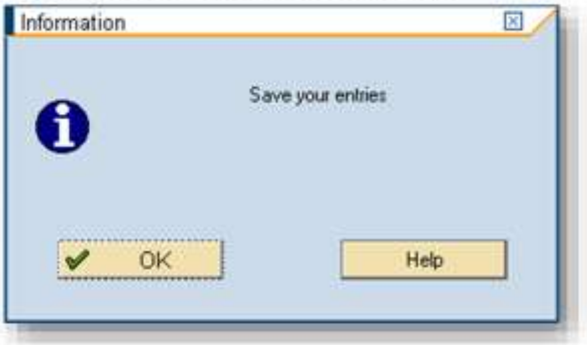
Do you still want to exit the current screen?

- ✓ You should click through yellow warning messages until you get a message (green) to save your entries. Don’t go directly to Save as these messages mean something.
- ✓ DOP recommends that you ***read and (enter)*** through warning messages and not go directly to the save button.
- ✓ Reading the message is critical to you understanding how the system works and increases your performance by avoiding mistakes.

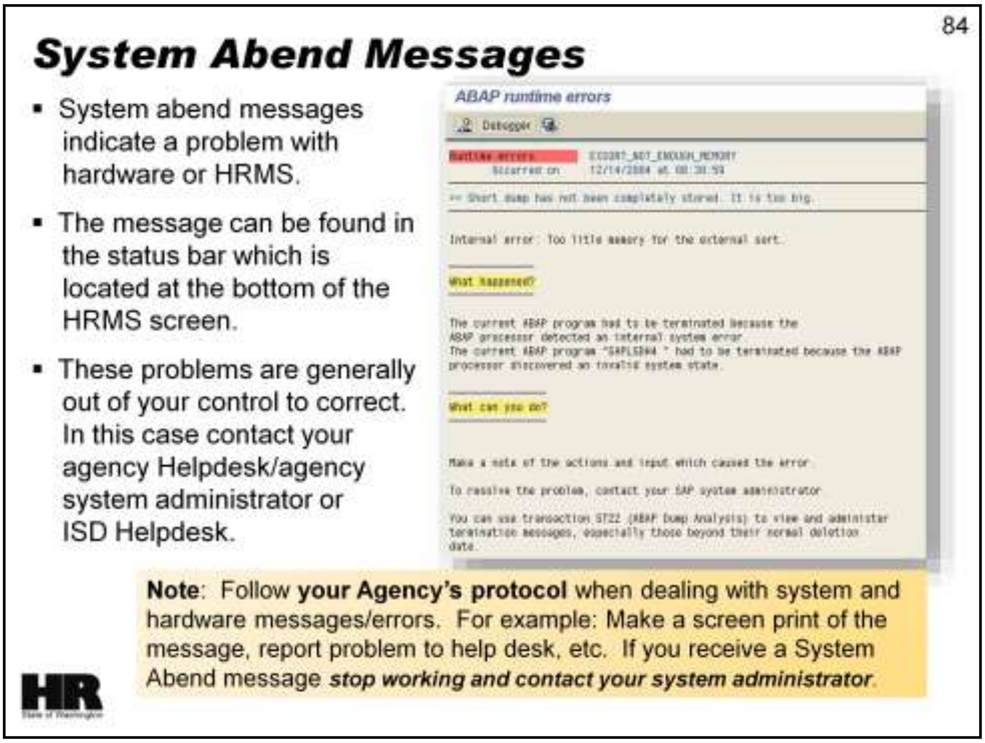
Information Messages

Once you complete a process, HRMS displays an information message verifying the task is complete.

- Information messages are meant to inform and do not require any further action other than to acknowledge the message prior to saving.
- The information message is indicated by a blue circle with a white "i" in a pop-up box and by the **Enter** button in the status bar.



Save your entries



System Abend Messages

- System abend messages indicate a problem with hardware or HRMS.
- The message can be found in the status bar which is located at the bottom of the HRMS screen.
- These problems are generally out of your control to correct. In this case contact your agency Helpdesk/agency system administrator or ISD Helpdesk.

ABAP runtime errors

```
Runtime errors      EXSORT_NOT_ENOUGH_MEMORY
      Occurred on   12/14/2004 at 08:38:59

>> Short dump has not been completely stored. It is too big.

Internal error: Too little memory for the external sort.

What happened?

The current ABAP program had to be terminated because the
ABAP processor detected an internal system error.
The current ABAP program "SAPLS084 " had to be terminated because the ABAP
processor discovered an invalid system state.

What can you do?

Make a note of the actions and input which caused the error.

To resolve the problem, contact your SAP system administrator.

You can use transaction ST22 (ABAP Dump Analysis) to view and administer
termination messages, especially those beyond their normal deletion
date.
```

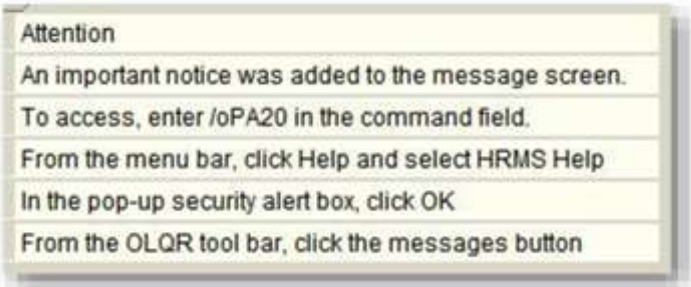
Note: Follow **your Agency's protocol** when dealing with system and hardware messages/errors. For example: Make a screen print of the message, report problem to help desk, etc. If you receive a System Abend message ***stop working and contact your system administrator***.

- ✓ ABAP (Advanced Business Application Programming)

ZAlert System Messages

- Messages are sent by the Customer Support unit and will appear when logged into the system or when first logging in.
- Messages will vary and may contain information regarding payroll pick-up or may direct you to the HRMS Message Center.

Note: ZAlerts will last up to 2 hours after being displayed. Once the message has expired you will no longer see the message.



Attention

An important notice was added to the message screen.

To access, enter /oPA20 in the command field.

From the menu bar, click Help and select HRMS Help

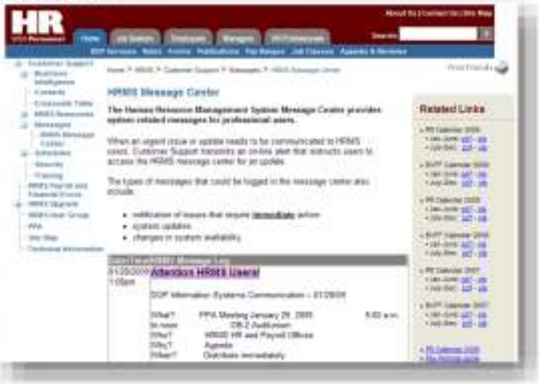
In the pop-up security alert box, click OK

From the OLQR tool bar, click the messages button

✓ Be sure to check the message center frequently, as you may miss ZAlerts from earlier in the day.

HRMS Message Center

- When an issue or update needs to be communicated to HRMS users, Customer Support transmits a ZAlert that instructs user to access the HRMS message center for an update.
- Messages can be accessed through the Customer Support website http://www.dop.wa.gov/hrms/CustomerSupport/messages or through the OLQR.

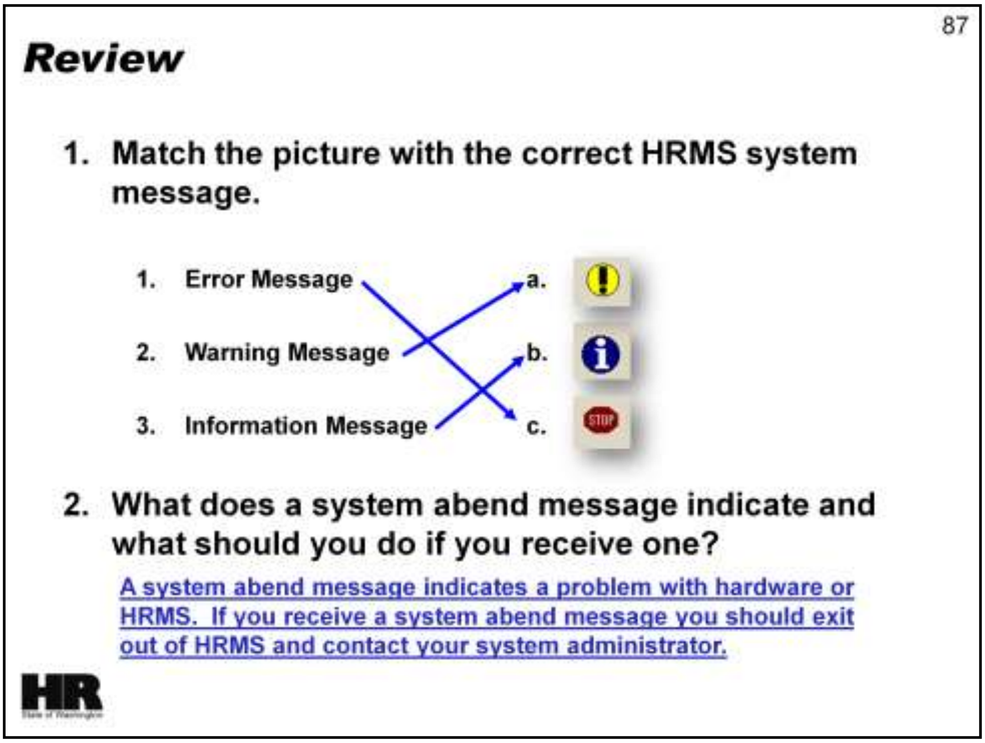


HRMS Message Center

Related Links

Attention HRMS Users!

✓ Old messages will be are saved in the archived files listed on the same page.



Review

1. Match the picture with the correct HRMS system message.
   1. Error Message
   2. Warning Message
   3. Information Message

   a. ❗
   b. ℹ
   c. STOP

2. What does a system abend message indicate and what should you do if you receive one?

   A system abend message indicates a problem with hardware or HRMS. If you receive a system abend message you should exit out of HRMS and contact your system administrator.

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

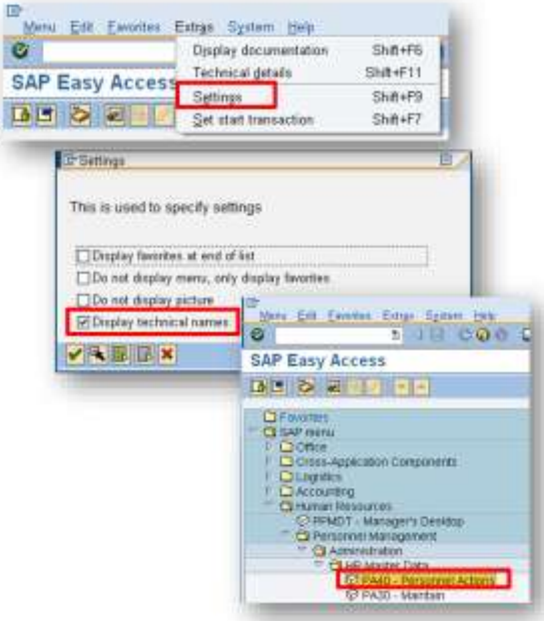
- **Question 1:**
  1. c
  2. a
  3. b
- **Question 2:** A System abend message indicates a problem with hardware or HRMS. If you receive a Systems abend message you should exit out of HRMS and contact your system administrator.

What questions do you have before we move on to the next topic?

Helpful Hints

#1 Display transaction codes in HRMS Menu

1. On the *SAP Easy* Access screen, from the Menu bar, select **Extras** then **Settings**
2. A pop-up box will appear, click the **Display technical names** checkbox
3. Click the ✓ **(Enter)** button in bottom left corner of screen



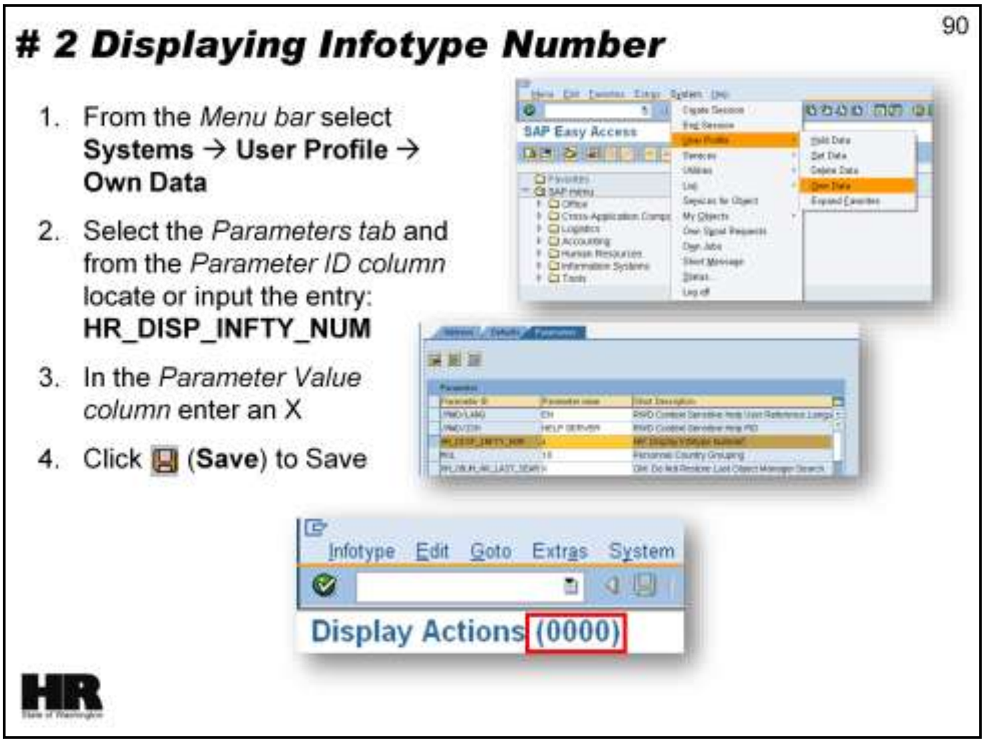
Settings

This is used to specify settings

☐ Display favorites at end of list
☐ Do not display menu, only display favorites
☐ Do not display picture
☑ Display technical names

Menu Edit Favorites Extras System Help
SAP Easy Access
Display documentation Shift+F6
Technical details Shift+F11
Settings Shift+F9
Set start transaction Shift+F7
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
PPMDT - Manager's Desktop
Personnel Management
Administration
HR Master Data
PA40 - Personnel Actions
PA30 - Maintain

Instructor – The final results, when using the "drill-down" method, the transaction codes will display.



2 Displaying Infotype Number

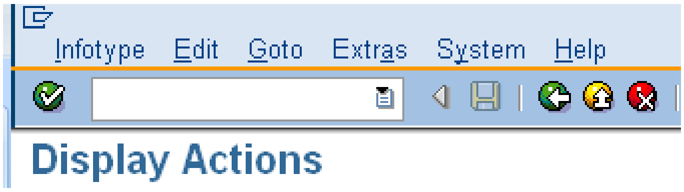
1. From the *Menu bar* select **Systems → User Profile → Own Data**
2. Select the *Parameters tab* and from the *Parameter ID column* locate or input the entry: **HR_DISP_INFTY_NUM**
3. In the *Parameter Value column* enter an X
4. Click (**Save**) to Save

SAP Easy Access
Infotype Edit Goto Extras System

Display Actions (0000)

Instructor - Final results, the title bar now displays the infotype number along with it's name. This is helpful when contacting the ISD Helpdesk as they make as what screen you are currently working in.

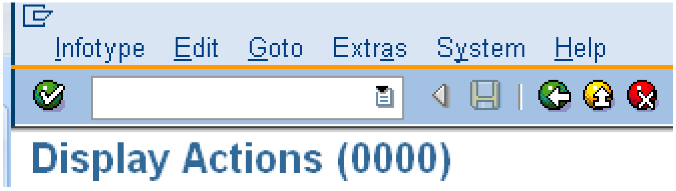
- ✓ The example below show the title bar with and without the Infotype number.



Infotype Edit Goto Extras System Help

Display Actions

vs.

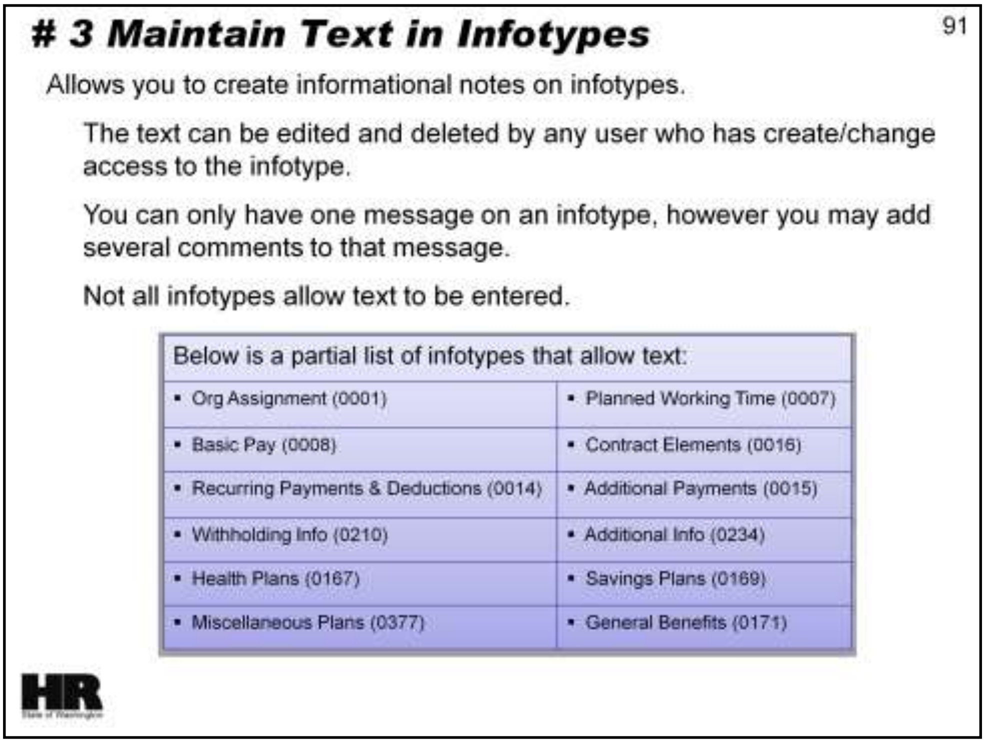


Infotype Edit Goto Extras System Help

Display Actions (0000)

To get the infotype numbers to display to the following:

Go to *System – User Profile – Own Data. Select the Parameters tab. Locate the Parameter ID named HR_DISP_INFTY_NUM, type the letter **x** in the Parameter value field. Save.*



3 Maintain Text in Infotypes

Allows you to create informational notes on infotypes.

The text can be edited and deleted by any user who has create/change access to the infotype.

You can only have one message on an infotype, however you may add several comments to that message.

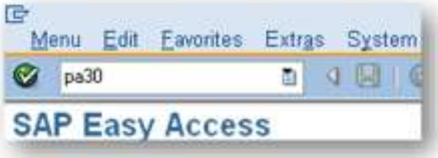
Not all infotypes allow text to be entered.

Below is a partial list of infotypes that allow text:	
▪ Org Assignment (0001)	▪ Planned Working Time (0007)
▪ Basic Pay (0008)	▪ Contract Elements (0016)
▪ Recurring Payments & Deductions (0014)	▪ Additional Payments (0015)
▪ Withholding Info (0210)	▪ Additional Info (0234)
▪ Health Plans (0167)	▪ Savings Plans (0169)
▪ Miscellaneous Plans (0377)	▪ General Benefits (0171)

Refer to the procedure **Infotype Message_Create (PA30)** on the OLQR

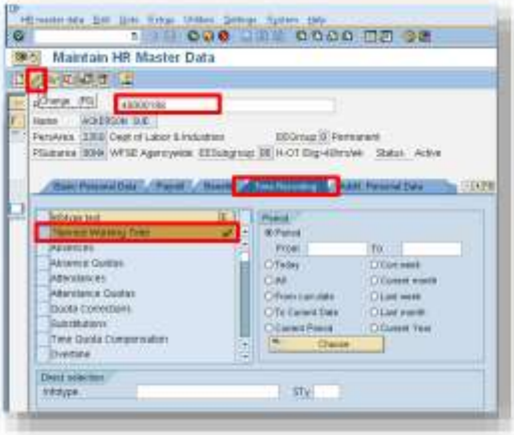
 # 3 Maintain Text in Infotypes (con't)

1. Enter the Transaction Code **PA30** in the command field
2. Click ✓ (**Enter**)
3. Enter the employee's *Personnel no.*
4. Select ***Planned Working*** *Time* (0007) on the ***Time Recording*** tab
5. Click ✎ (**Change**) to change the record


Menu
Edit
Favorites
Extras
System

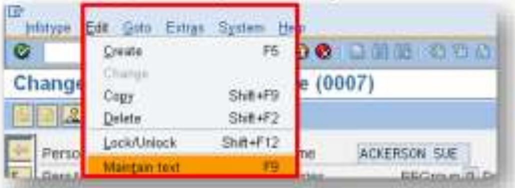
pa30

SAP Easy Access


Maintain HR Master Data
Planned Working Time
Absences
Absence Quotas
Attendances
Attendance Quotas
Quota Corrections
Substitutions
Time Quota Compensation
Overtime
Period
Direct selection
Infotype
STy

3 Maintain Text in Infotypes (con't)

6. From the **Menu bar**, click **Edit** and then **Maintain text**
7. Enter noteworthy text
8. Click 💾 (**Save**) to save your entry
9. Once saved, the (**maintain text**) icon will be placed on the infotype


Infotype
Edit
Goto
Extras
System
Help
Change
e (0007)
Create F5
Change
Copy Shift+F9
Delete Shift+F2
Lock/Unlock Shift+F12
Maintain text F9
ACKERSON SUE

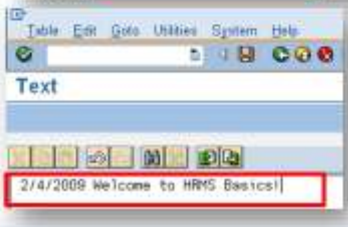
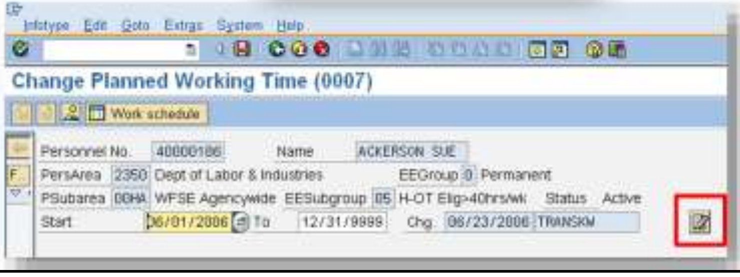
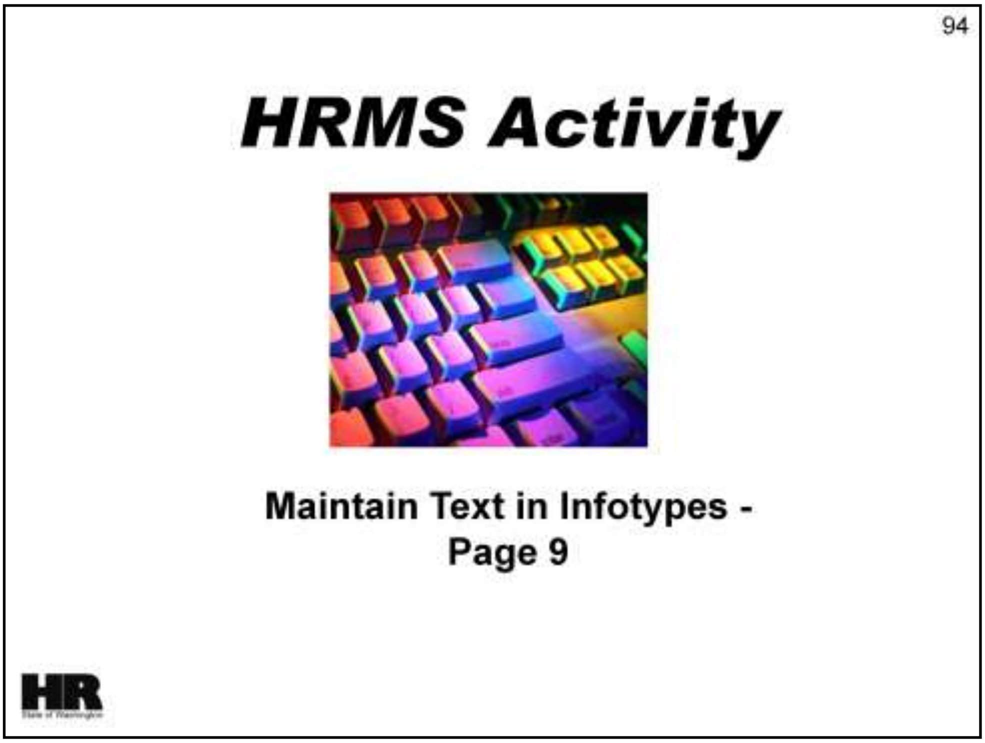


Table
Edit
Goto
Utilities
System
Help
Text

2/4/2009 Welcome to HRMS Basics!


Infotype
Edit
Goto
Extras
System
Help
Change Planned Working Time (0007)
Work schedule

Personnel No. 40000186 Name ACKERSON SUE
PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent
PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active
Start 06/01/2006 To 12/31/9999 Chg. 06/23/2006 TRANSKM

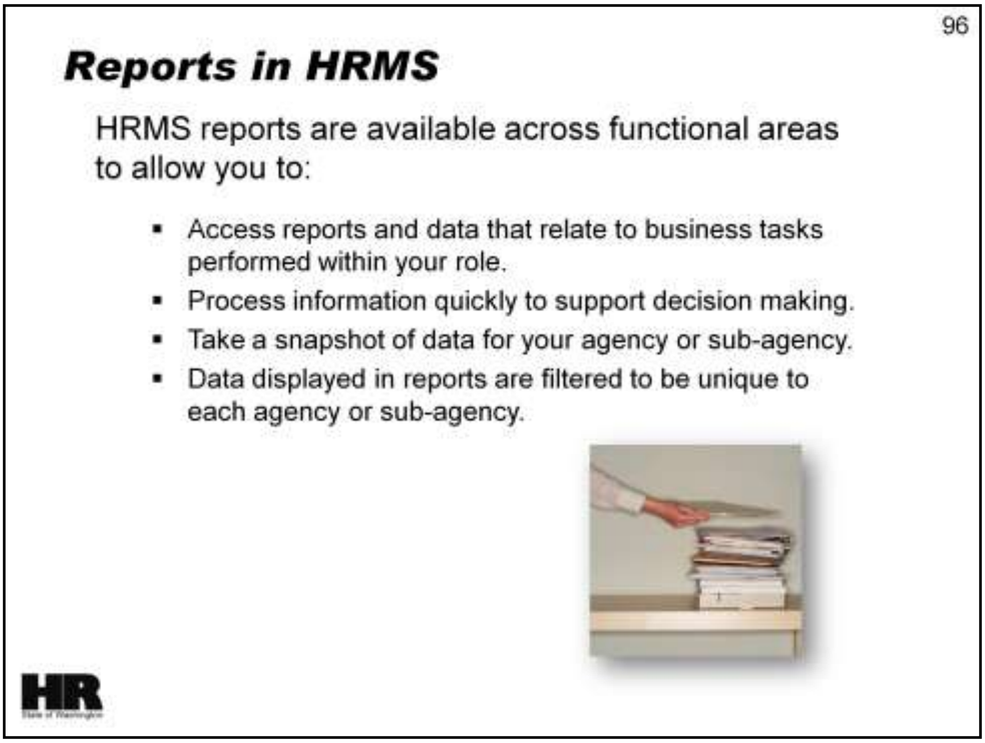


HRMS Activity

Maintain Text in Infotypes - Page 9

Reports

HR
State of Washington



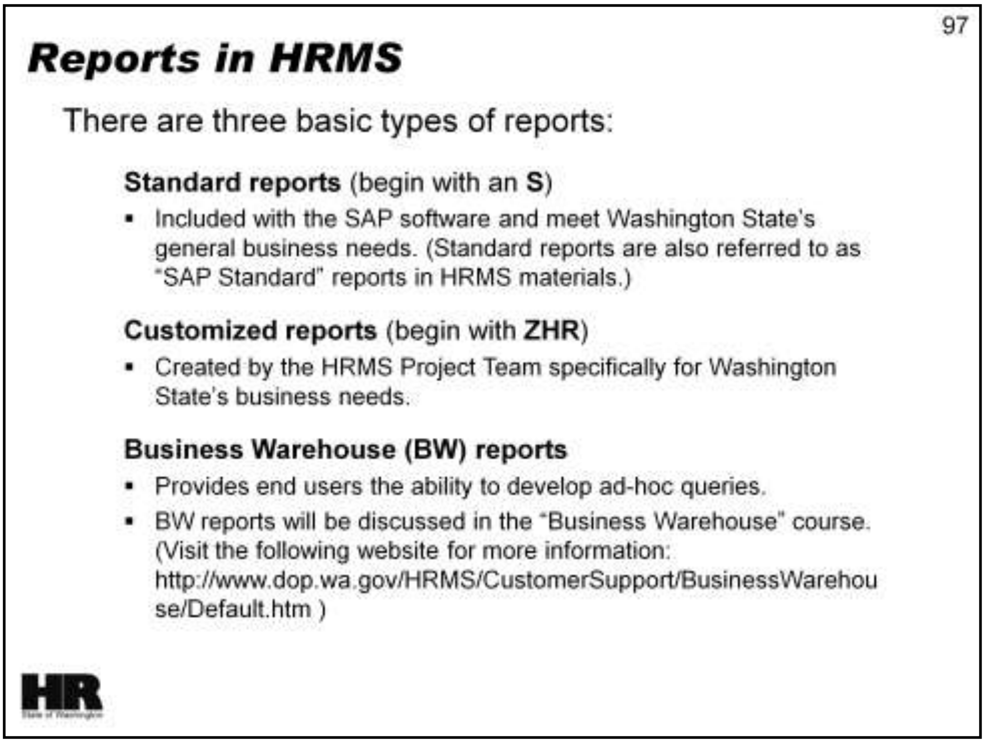
Reports in HRMS

HRMS reports are available across functional areas to allow you to:

- Access reports and data that relate to business tasks performed within your role.
- Process information quickly to support decision making.
- Take a snapshot of data for your agency or sub-agency.
- Data displayed in reports are filtered to be unique to each agency or sub-agency.

- ✓ Your role in HRMS determines your access to reports and data that relate to business tasks. Not all “Inquirer” roles have the ability to run reports.
- ✓ For example, the Department of Transportation is only able to run reports that include data belonging to their employees, not other agencies (such as Department of Natural Resources.)
- ✓ You can add reports to your favorites menu.

Instructor: *Ask participants of other examples when reports might be run.*



Reports in HRMS

There are three basic types of reports:

Standard reports (begin with an **S**)

- Included with the SAP software and meet Washington State's general business needs. (Standard reports are also referred to as "SAP Standard" reports in HRMS materials.)

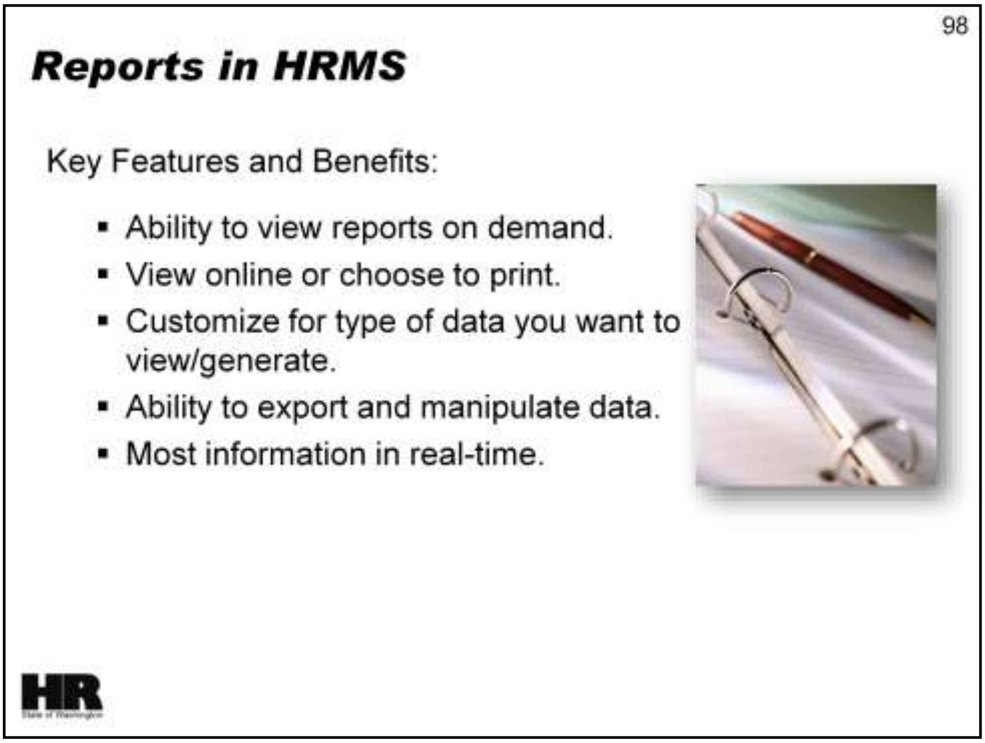
Customized reports (begin with **ZHR**)

- Created by the HRMS Project Team specifically for Washington State's business needs.

Business Warehouse (BW) reports

- Provides end users the ability to develop ad-hoc queries.
- BW reports will be discussed in the "Business Warehouse" course. (Visit the following website for more information: http://www.dop.wa.gov/HRMS/CustomerSupport/BusinessWarehouse/Default.htm)

- ✓ Standard Reports begin with a S in the transaction code.
- ✓ Customized Reports begin with a ZHR in the transaction code.
- ✓ Business Warehouse Power users creates ADHOC queries. There are canned queries available as well to BW End-Users.
- ✓ Business Warehouse Training is separate from HRMS functional courses. End-Users check the website for self-paced training. Only Power Users attend formal training. Your agency assigns the different BW security.
- ✓ SAP reports are "Real-Time" data while BW is based on stored payroll results.



Reports in HRMS

Key Features and Benefits:

- Ability to view reports on demand.
- View online or choose to print.
- Customize for type of data you want to view/generate.
- Ability to export and manipulate data.
- Most information in real-time.

Introduce the General Reporting job aid.

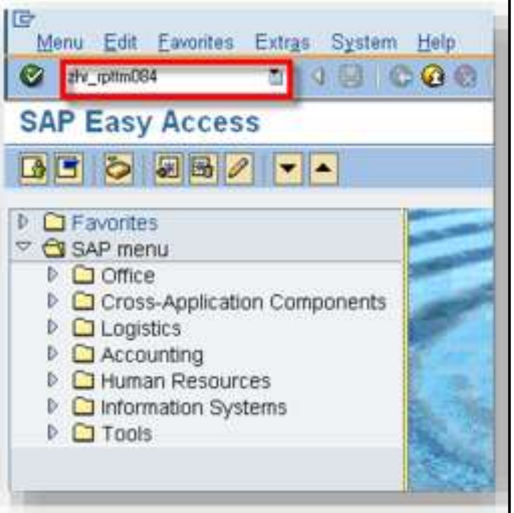
Remind participants about the HRMS Reports section in the OLQR

- ✓ You are able to view data for any time frame.
- ✓ View information for a certain employee or for the whole agency.
- ✓ Not limited to the number of selections.
- ✓ You can make several entries.
- ✓ Once the results are displayed, the report can be manipulated/revised even more.
- ✓ Option to print as many copies.

Accessing / Viewing Reports

Your role determines which reports you can access and the data that displays within the report.

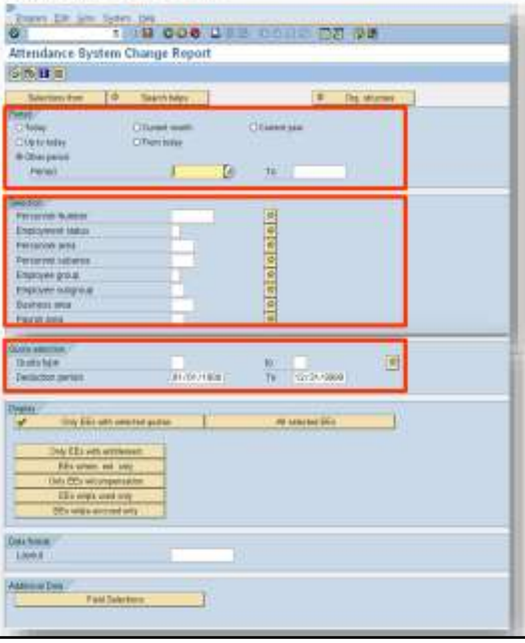
1. From the *SAP Easy Access* screen, type the transaction code in the **Command** field. (e.g. ZHR_RPTTM084 – Attendance System Change Report)
2. Click ✓ (**Enter**) to start transaction.


Menu
Edit
Favorites
Extras
System
Help
SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
Information Systems
Tools

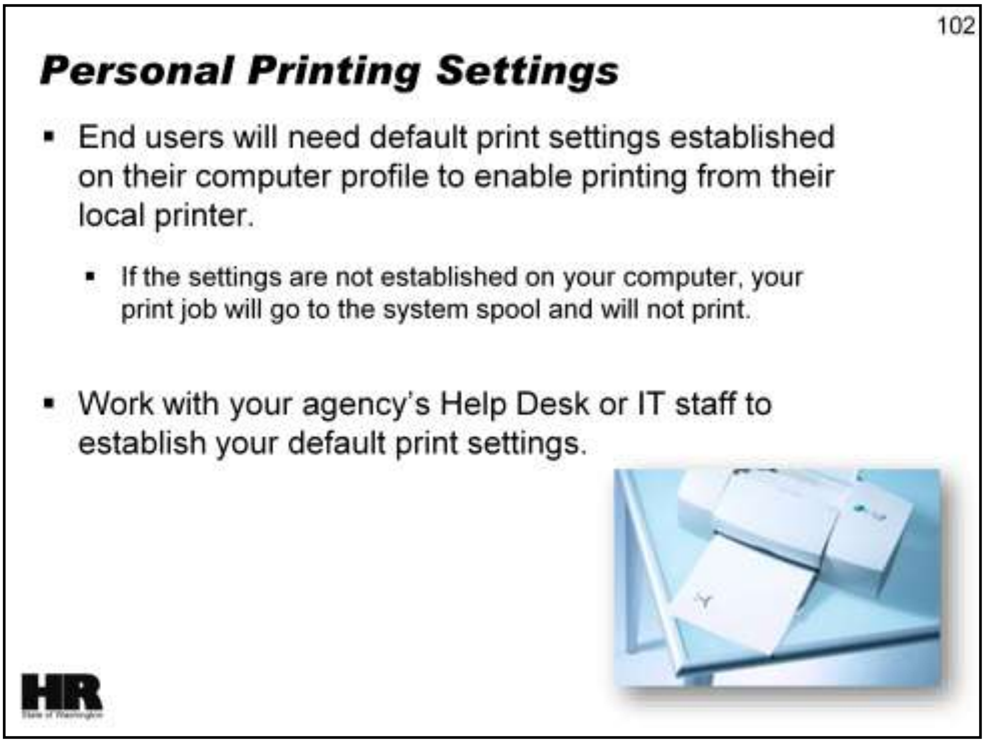
zhr_rpttm084

Accessing / Viewing Reports

3. Select the criteria for your report.
    - Period (time frame)
    - Selection (personnel number, personnel area, etc.)
    - Quota selection (additional selection area)
4. Once selected, click (**Execute**) to execute the report.


Attendance System Change Report
Selections from
Search helps
Org. structure
Period
Today
Current month
Current year
Up to today
From today
Other period
Period
To
Selection
Personnel Number
Employment status
Personnel area
Personnel subarea
Employee group
Employee subgroup
Business area
Payroll area
Quota selection
Quota type
to
Deduction period
To
Display
Only EEs with selected quotas
All selected EEs
Data format
Layout
Additional Data
Field Selections

Printing and Variants



Personal Printing Settings

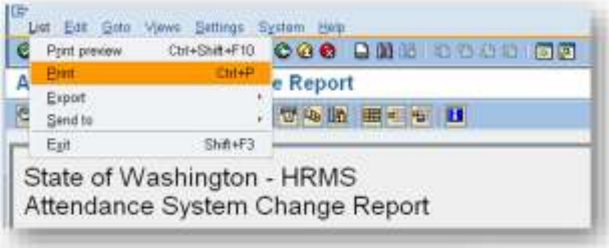
- End users will need default print settings established on their computer profile to enable printing from their local printer.
    - If the settings are not established on your computer, your print job will go to the system spool and will not print.
- Work with your agency's Help Desk or IT staff to establish your default print settings.

✓ Refer to Job Aids

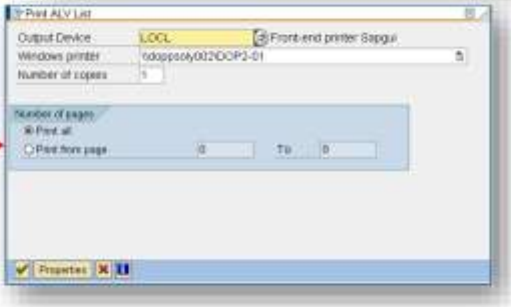
Printing Reports

Once you have executed a report and have viewed the results, you can choose to print a copy.

1. From the menu bar, select List
2. Select Print
3. The Print ALV List window appears, confirm the correct printer is selected.
4. Enter number of copies
5. Click ✓ (**Enter**)


List
Edit
Goto
Views
Settings
System
Help
Print preview Ctrl+Shift+F10
Print Ctrl+P
Export
Send to
Exit Shift+F3
e Report

State of Washington - HRMS
Attendance System Change Report


Print ALV List
Number of pages
Properties

Output Device: LOCL Front-end printer Sapgui
Windows printer: \\doppsoly002\DOP2-01
Number of copies: 1

● Print all
○ Print from page 0 To 0

Report Variant

- A **Variant** is a report where one or more selected criteria is saved as a parameter.
  - Use variants to access frequently used/common reports.
  - Eliminates redundant data entry.
- Once you have accessed a report you are able to save a variant.
- A list of statewide variants is located on the Customer Support page by selecting HRMS Resources.
  - **Statewide Variant List:** DOP created this list to assist agencies in identifying statewide variants. The spreadsheet has several worksheets. The first worksheet lists **ALL statewide variants**.

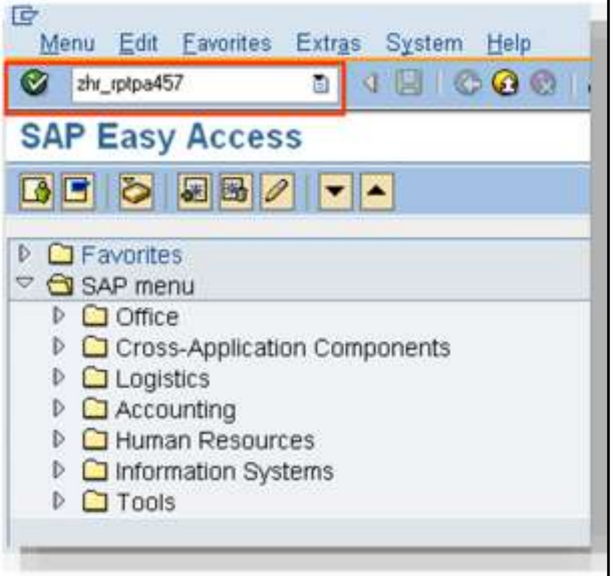
Note: Be sure to review state-wide variants (swv) before creating new ones.

Create/Save a Variant

Creating a Variant

To create a Variant, a report transaction code is required.

- Enter a transaction code in the Command field.
- Click ✓ (Enter) to start the transaction.



Menu
Edit
Favorites
Extras
System
Help

zhr_rptpa457

SAP Easy Access
Favorites
SAP menu
Office
Cross-Application Components
Logistics
Accounting
Human Resources
Information Systems
Tools

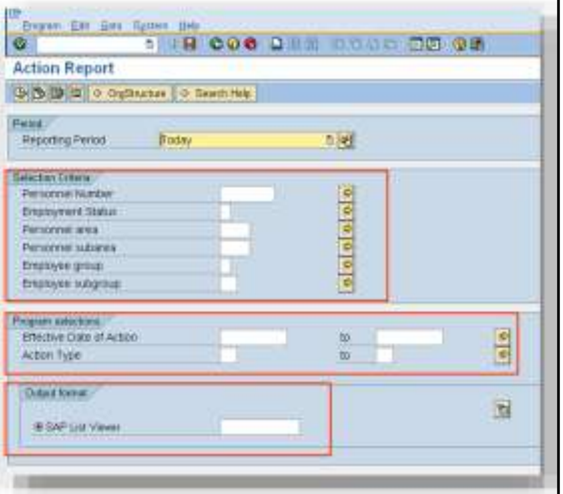
Creating a Variant

You must select fields (criteria) in order to save the variant.

- For this example we will select fields in these areas:
  - *Selection Criteria*
  - *Program selections*

  There is no minimum or maximum number of criteria you can use to create a variant.

  The more criteria used the more specific the report; less criteria, the more general the report.



Action Report

Period

Reporting Period: Today

Selection Criteria

Personnel Number

Employment Status

Personnel area

Personnel subarea

Employee group

Employee subgroup

Program selections

Effective Date of Action to

Action Type to

Output format

● SAP List Viewer

Refer to Variants_Create and Retrieve in the OLQR

Creating a Variant

In this example, a variant will be created for the *Action Report* (ZHR_RPTPA457).

Used to identify all new hires in the agency.

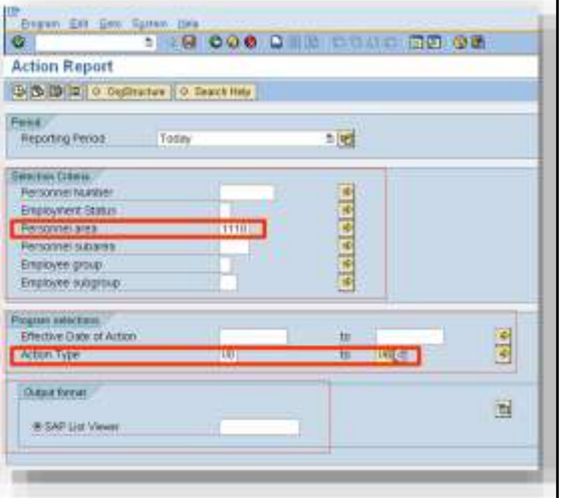
Add entries in the *Selection Criteria* area and *Program selections* area.

- Personnel area

  1110 – Dept. of Personnel

- Action Type

  U0 New Hire *to* U6 Re-hire



Action Report

Period

Reporting Period: Today

Selection Criteria

Personnel Number

Employment Status

Personnel area: 1110

Personnel subarea

Employee group

Employee subgroup

Program selections

Effective Date of Action to

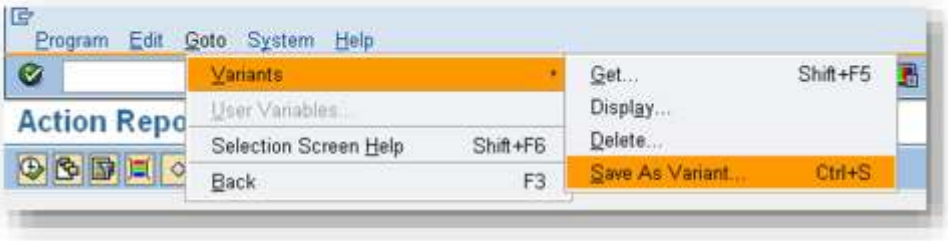
Action Type: U0 to U6

Output format

● SAP List Viewer

Saving a Variant

1. To save the report with your selected criteria, on the Menu Bar click **Goto → Variants → Save as Variant**


Program
Edit
Goto
System
Help
Action Repo
Variants
User Variables...
Selection Screen Help Shift+F6
Back F3
Get... Shift+F5
Display...
Delete...
Save As Variant... Ctrl+S

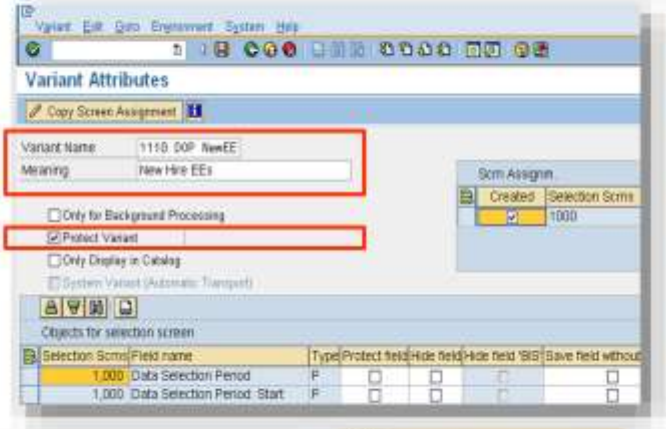
Note: You can also use [Ctrl + S] or click (Save) to save a variant.

- ✓ It is recommended to save variants using Agency code first, then naming convention.
- ✓ If there is a Statewide variant, there is no need to re-save the variant for your needs, just change the Business Area and/or date.

Saving a Variant

2. Complete the *Variant Name* and *Meaning* fields
3. Click ✓ (**Enter**) to validate the data
4. Click 💾 (**Save**) to save the data

You will return to the report page


Variant
Edit
Goto
Environment
System
Help
Variant Attributes
Copy Screen Assignment
Scrn Assignm.

Variant Name: 1110 DOP NewEE

Meaning: New Hire EEs

☐ Only for Background Processing

☑ Protect Variant

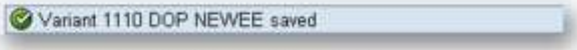
☐ Only Display in Catalog

☐ System Variant (Automatic Transport)

Created	Selection Scrns
☑	1000

Objects for selection screen

Selection Scrns	Field name	Type	Protect field	Hide field	Hide field 'BIS'	Save field withou
1,000	Data Selection Period	P	☐	☐	☐	☐
1,000	Data Selection Period: Start	P	☐	☐	☐	☐


✓ Variant 1110 DOP NEWEE saved

The variant was saved.
Note the message in the status bar.

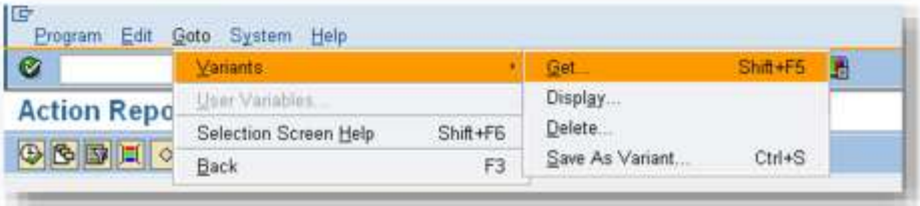
Tip:

Clicking the Protect Variant box will help ensure that no one will save over your variant. This is optional.

Retrieve a Variant

Retrieve a Variant

1. To retrieve a variant from the report screen click **Goto → Variants → Get**


Program Edit Goto System Help
Variants
User Variables...
Selection Screen Help Shift+F6
Back F3
Get... Shift+F5
Display...
Delete...
Save As Variant... Ctrl+S
Action Repo

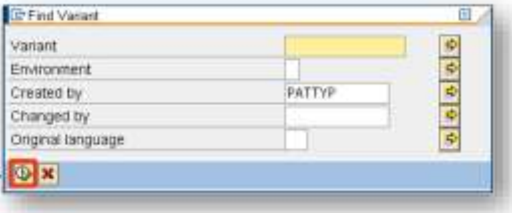
Note: You can also click Shift + F5 or click ⎘ (Get Variant) button to retrieve a variant.

Retrieve a Variant

2. Click (Execute) to search for the variants *you* created.

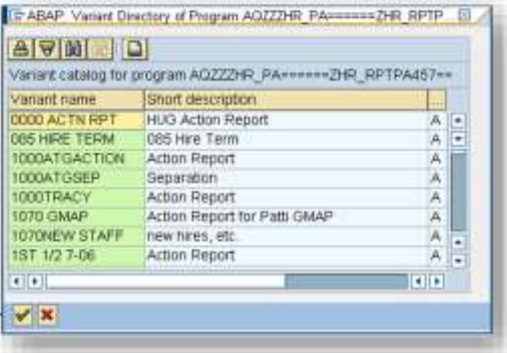
Or

2. Remove your user name from the Created by field to see all variants created.
3. A pop-up box providing a list of variants appears. Double-click on the variant report that you want to retrieve. Or click once on the variant name, then click ✓ (Choose) to bring your selection into the report screen.



Find Variant

Variant
Environment
Created by PATTYP
Changed by
Original language



ABAP: Variant Directory of Program AQZZZHR_PA======ZHR_RPTP

Variant catalog for program AQZZZHR_PA======ZHR_RPTPA457==

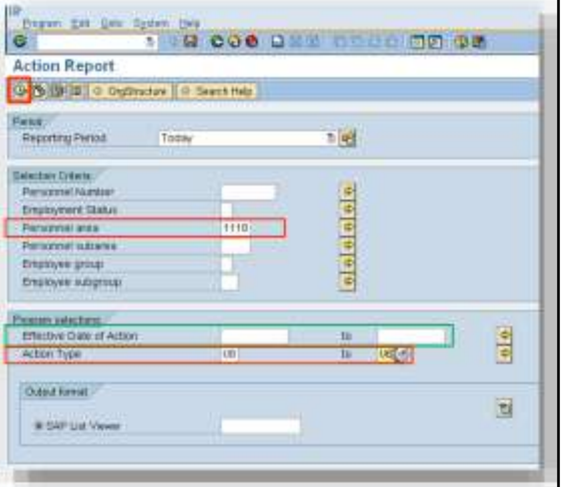
Variant name	Short description	...
0000 ACTN RPT	HUG Action Report	A
085 HIRE TERM	085 Hire Term	A
1000ATGACTION	Action Report	A
1000ATGSEP	Separation	A
1000TRACY	Action Report	A
1070 GMAP	Action Report for Patti GMAP	A
1070NEW STAFF	new hires, etc.	A
1ST 1/2 7-06	Action Report	A

Retrieve a Variant

3. The variant (with the saved selection criteria) will display within the report fields, click ⦿ (**Execute**) to generate the report.

Prior to clicking ⦿ (**Execute**) you can add additional selection criteria if needed (such as an **Effective Date of Action** [date range]).

- Adding selection criteria will not change the saved variant settings. This is for a one-time selection.
- To keep the additional criteria selections, resave the variant.


Program
Edit
Goto
System
Help
OrgStructure
Search Help
Period
Selection Criteria
Personnel Number
Employment Status
Personnel subarea
Employee group
Employee subgroup
Program selections
Effective Date of Action
to
Output format

Action Report

Reporting Period: Today

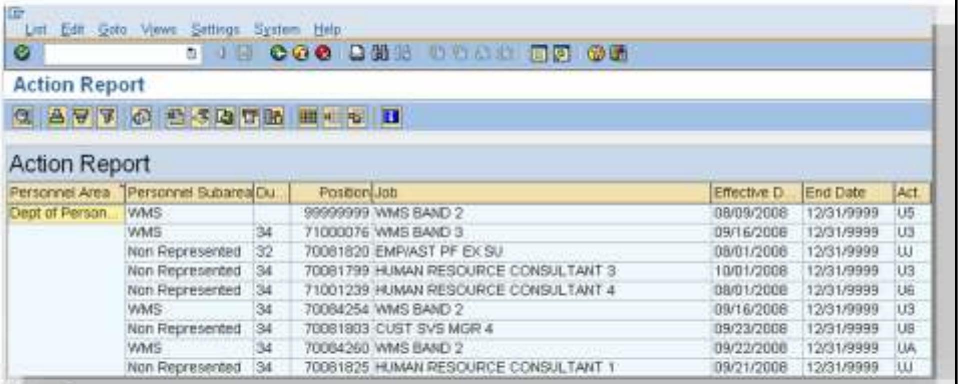
Personnel area: 1110

Action Type: U0 to U6

● SAP List Viewer

Retrieve a Variant

- The requested report is generated based on the selection criteria outlined in the variant.
- At this time you would verify the report information and utilize the report as desired.



Action Report

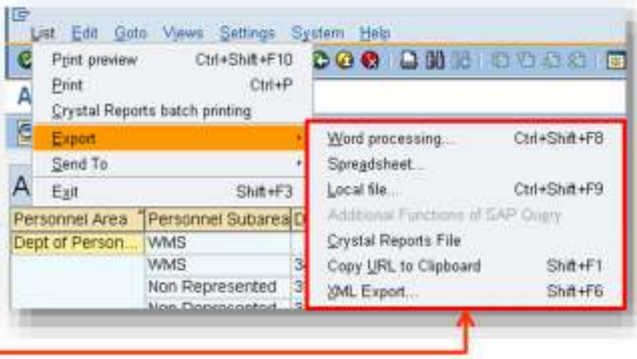
Personnel Area	Personnel Subarea	Du...	Position	Job	Effective D...	End Date	Act.
Dept of Person...	WMS		99999999	WMS BAND 2	08/09/2008	12/31/9999	U5
	WMS	34	71000076	WMS BAND 3	09/16/2008	12/31/9999	U3
	Non Represented	32	70081820	EMP/AST PF EX SU	08/01/2008	12/31/9999	UJ
	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3	10/01/2008	12/31/9999	U3
	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4	08/01/2008	12/31/9999	U6
	WMS	34	70084254	WMS BAND 2	09/16/2008	12/31/9999	U3
	Non Represented	34	70081803	CUST SVS MGR 4	09/23/2008	12/31/9999	U8
	WMS	34	70084260	WMS BAND 2	09/22/2008	12/31/9999	UA
	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1	09/21/2008	12/31/9999	UJ

Export a Report

Exporting Report Data

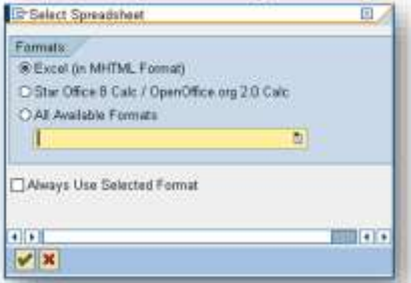
Once you have run a report, use the menu bar to export data.

1. Select List then Export to select the type of file you want to create.


List
Edit
Goto
Views
Settings
System
Help
Print preview Ctrl+Shift+F10
Print Ctrl+P
Crystal Reports batch printing
Export
Send To
Exit Shift+F3
Word processing... Ctrl+Shift+F8
Spreadsheet...
Local file... Ctrl+Shift+F9
Additional Functions of SAP Query
Crystal Reports File
Copy URL to Clipboard Shift+F1
XML Export... Shift+F6
Personnel Area
Personnel Subarea
Dept of Person...
WMS
WMS
Non Represented
Non Represented

Exporting Report Data (con't)

2. If you accept the default format - Excel (in MHTML Format) then, click (Continue) ✓ move to the next step in exporting the report results.
3. If another format is needed click on All Available Formats to choose your desired format.

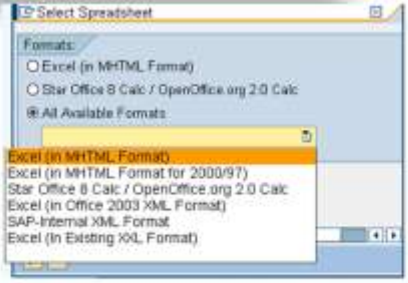


Select Spreadsheet

Formats:

● Excel (in MHTML Format)
○ Star Office 8 Calc / OpenOffice.org 2.0 Calc
○ All Available Formats

☐ Always Use Selected Format



Select Spreadsheet

Formats:

○ Excel (in MHTML Format)
○ Star Office 8 Calc / OpenOffice.org 2.0 Calc
● All Available Formats

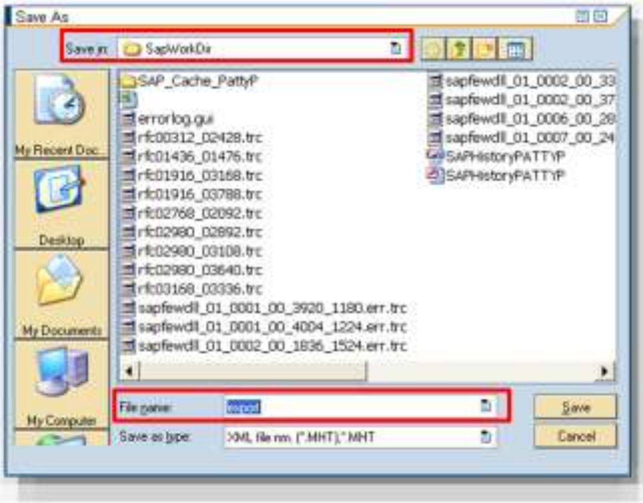
Excel (in MHTML Format)
Excel (in MHTML Format for 2000/97)
Star Office 8 Calc / OpenOffice.org 2.0 Calc
Excel (in Office 2003 XML Format)
SAP-Internal XML Format
Excel (In Existing XXL Format)

MHTML is short for MIME HTML which is a web page archive format.

Exporting Report Data (con't)

If the Excel (in MHTML Format) was selected.

1. Identify the location to save the file and the file name.
2. Click Save (Save) icon to save the file.


Save As
My Recent Doc...
Desktop
My Documents
My Computer
SAP_Cache_PattyP
errorlog.gui
rfc00312_02428.trc
rfc01436_01476.trc
rfc01916_03168.trc
rfc01916_03788.trc
rfc02768_02092.trc
rfc02980_02892.trc
rfc02980_03108.trc
rfc02980_03640.trc
rfc03168_03336.trc
sapfewdll_01_0001_00_3920_1180.err.trc
sapfewdll_01_0001_00_4004_1224.err.trc
sapfewdll_01_0002_00_1836_1524.err.trc
sapfewdll_01_0002_00_33
sapfewdll_01_0002_00_37
sapfewdll_01_0006_00_28
sapfewdll_01_0007_00_24
SAPHistoryPATTYP
SAPHistoryPATTYP
Save
Cancel

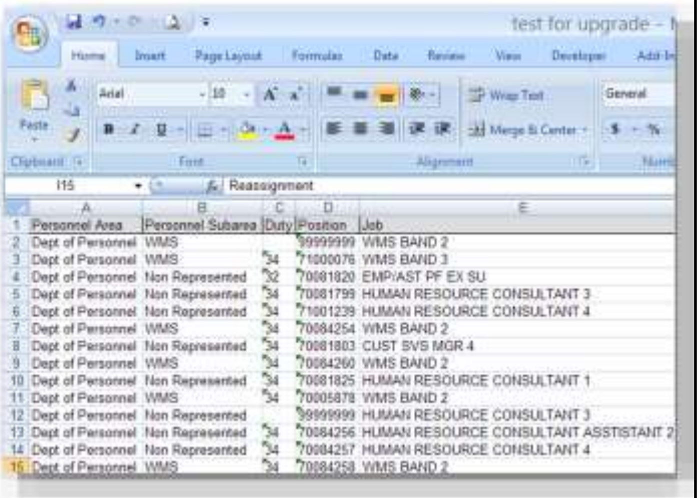
Save in: SapWorkDir

File name: report

Save as type: XML file mm (*.MHT),*.MHT

Exporting Report Data

The format that you previously selected (ex: Excel) will open displaying the report results.

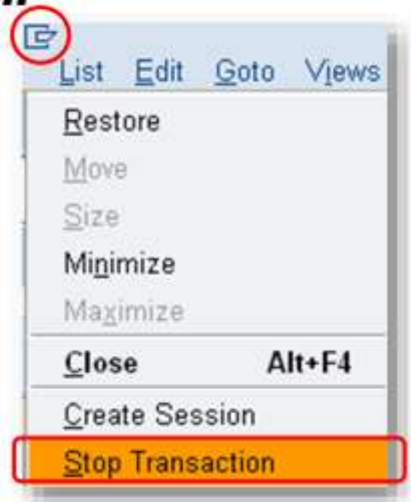

test for upgrade
Home
Insert
Page Layout
Formulas
Data
Review
View
Developer
Paste
Arial
10
Wrap Text
Merge & Center
General
Clipboard
Font
Alignment

I15 Reassignment

	A	B	C	D	E
1	Personnel Area	Personnel Subarea	Duty	Position	Job
2	Dept of Personnel	WMS		99999999	WMS BAND 2
3	Dept of Personnel	WMS	34	71000076	WMS BAND 3
4	Dept of Personnel	Non Represented	32	70081820	EMP/AST PF EX SU
5	Dept of Personnel	Non Represented	34	70081799	HUMAN RESOURCE CONSULTANT 3
6	Dept of Personnel	Non Represented	34	71001239	HUMAN RESOURCE CONSULTANT 4
7	Dept of Personnel	WMS	34	70084254	WMS BAND 2
8	Dept of Personnel	Non Represented	34	70081803	CUST SVS MGR 4
9	Dept of Personnel	WMS	34	70084260	WMS BAND 2
10	Dept of Personnel	Non Represented	34	70081825	HUMAN RESOURCE CONSULTANT 1
11	Dept of Personnel	WMS	34	70005878	WMS BAND 2
12	Dept of Personnel	Non Represented		99999999	HUMAN RESOURCE CONSULTANT 3
13	Dept of Personnel	Non Represented	34	70084256	HUMAN RESOURCE CONSULTANT ASSTISTANT 2
14	Dept of Personnel	Non Represented	34	70084257	HUMAN RESOURCE CONSULTANT 4
15	Dept of Personnel	WMS	34	70084258	WMS BAND 2

Stopping a Transaction

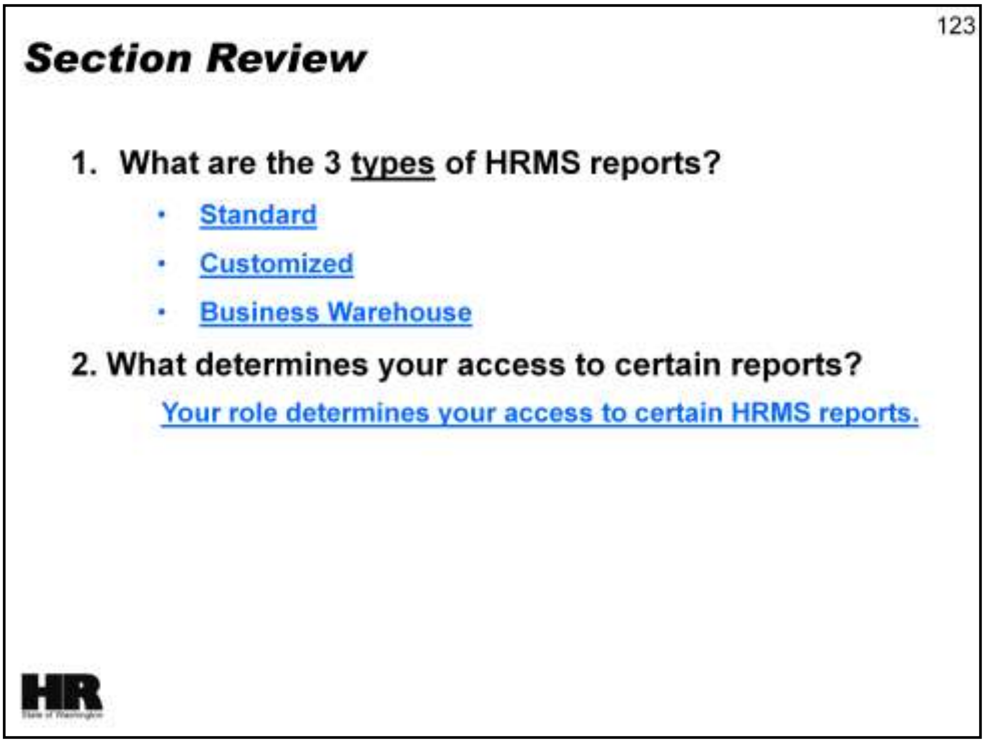
1. To end a report before it has completed, you can stop the transaction
2. From the Menu bar click the square in the uppermost left corner
3. Click **Stop transaction**


List
Edit
Goto
Views
Restore
Move
Size
Minimize
Maximize
Close Alt+F4
Create Session
Stop Transaction

Note: Once selected, you will be taken directly to the SAP Easy Access screen.

HRMS Activity

Exporting Report Data
Activity – Page 12



Section Review

1. What are the 3 types of HRMS reports?
   - Standard
   - Customized
   - Business Warehouse
2. What determines your access to certain reports?

   Your role determines your access to certain HRMS reports.

Allow the class time to write out the answers to the review questions before displaying/discussing the answers.

Answers:

- **Question 1:**
  - The three types of HRMS reports are:
    - Standard
    - Customized
    - Business Warehouse reports.

- **Question 2:** Your role determines your access to certain HRMS reports.

What questions do you have before we move on to the next topic?

Inquiries and Practice

Inquiries and Practice

When you get back to your office, take the opportunity to complete more activities that bring together the concepts that you have learned in HRMS Basics training.

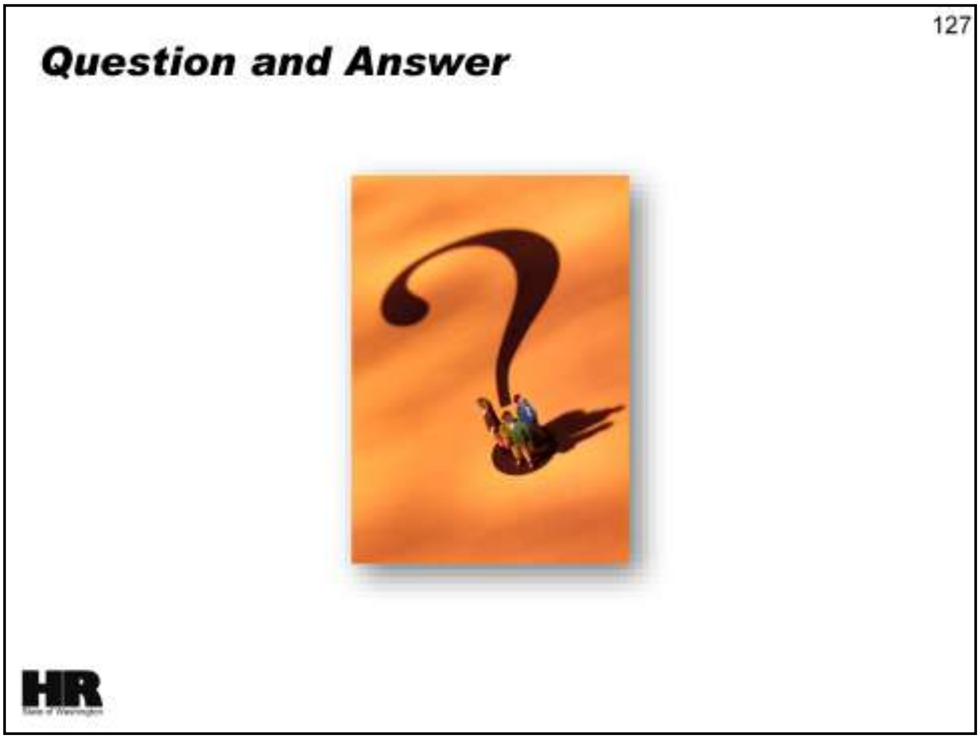
Use the Practice Activities that are in the Activity Guide along with the additional activities at the end of the Activity Guide.

- **Activity 8 – Viewing Employee Information**
- **Activity 9 – Viewing Basic Payroll Information**

Inquiries and Practice

As you complete each activity remember that these additional resources are available to assist you:

- HRMS Job Aids
- HRMS Training Guide
- HRMS Activity Packet



Question and Answer

HR

State of Washington

***Instructor** – At this time answer any un-answered questions and make sure that all questions from the parking lot have been addressed or will be followed up on.*

Resources

Department of Personnel's ISD Help Desk

(360) 664-6400

email: helpdesk@dop.wa.gov

The On-Line Quick Reference (OLQR)

Online at: http://win-shrweb.dis.wa.gov/olqr/nav/index.htm

Training Evaluation

- Please take a few minutes to complete the course **(2 sided)** evaluation and participant assessment prior to leaving.

Thank you
for your participation